

Module B-5 Reaching Out Through Service (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Provide topic – have participants open PETS Workbook, B-5: Reaching Out Through Service. Refer to the three objectives. Introduce presenters(s). Conduct Icebreaker and Midway Review. See Icebreaker and Midway Review Questions	15 min
2.	Main Room/ Content Overview	1st Learning Objective: Articulate the value of building a balanced program of local community and international service projects, based on club membership interests. Facilitate discussion: 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? See Breakout Discussion Questions	20 min
3.	Breakouts/ Discussions	2nd Learning Objective: Define key elements of an effective project. Refer to What makes a service project effective? See handout in your PETS Workbook. Facilitate discussion: What elements make up an effective project? Which element is most important? Which element(s) in your club's projects needs your leadership?	20 min
4.	Breakouts/ Discussions	3rd Learning Objective: Identify key club members who have leadership and passion for various projects. Facilitate discussion: 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?	20 min
5.	Sharing Back/ Q & A	Ask for good ideas to share and takeaways. Ask for any questions and respond briefly.	10 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	5 min

Lone Star P.E.T.S. 2025

PRESIDENTS-ELECT WORKBOOK

SATURDAY, MARCH 1, 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](#)
-

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.

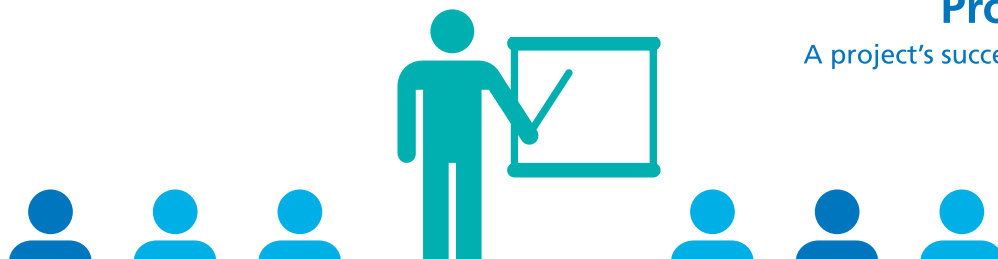
Encourage local ownership

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.

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.

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.



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.

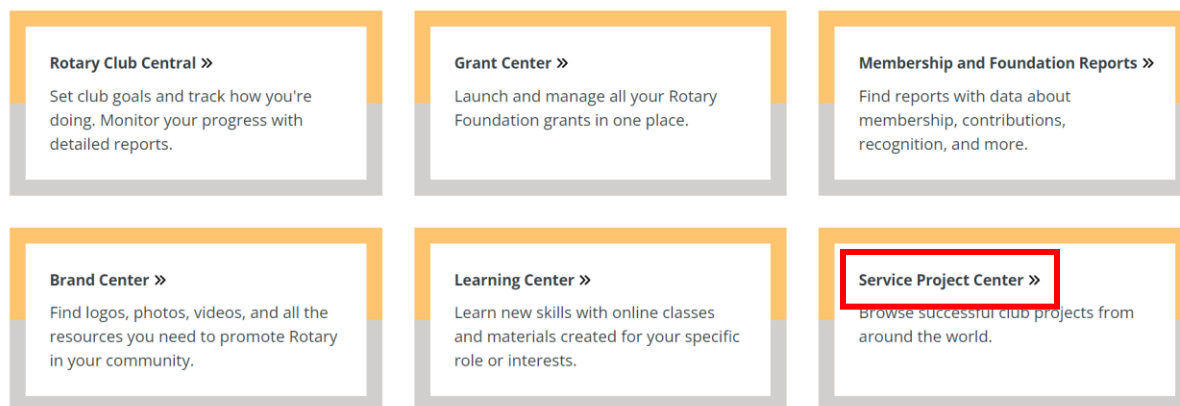
1. Who can access the Service Project Center?

Anyone can search or view service projects on SPC.

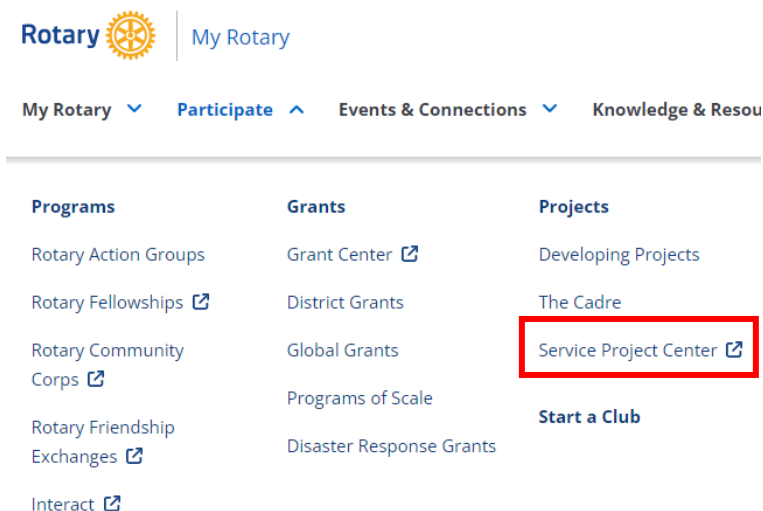
2. How do members find the Service Project Center on My Rotary?

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

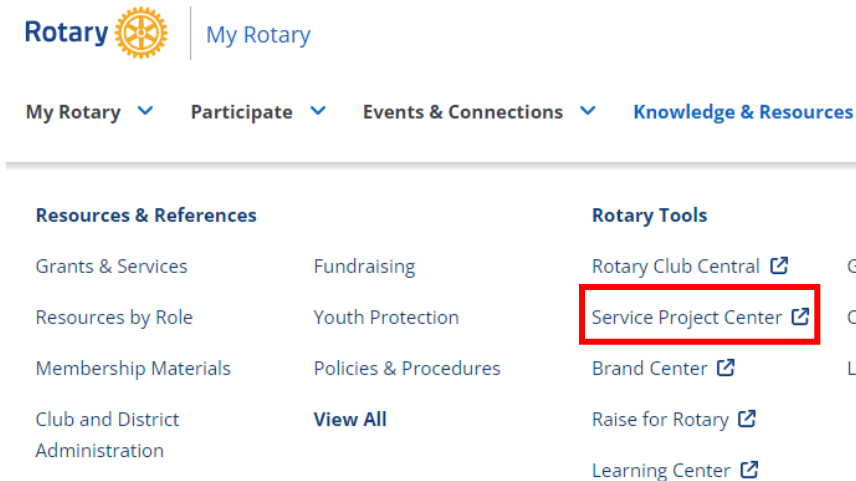
1. My Rotary landing page



2. Under *Participate*



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

 Edit project

 Copy project


 Share Project


 Delete project

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

 Edit project

 Copy project

 Share Project

 Delete project

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.



Service Project Center

Add a New Project

Home

Browse Projects

My Club Projects

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.

Reports

These reports provide context for your goals and activities. Browse club, district, and regional reports to learn more about membership and engagement, service, and Foundation giving.

Members & Engagement	Service
Club Reports	
REPORT	
Goal History by Club	
Service Activity by Club	
List of Rotary Community Corps	

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Module B-6 Building Successful Fundraising Strategies (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Provide topic – have participants open PETS Workbook, B-6: Building Successful Fundraising Strategies. Refer to the three objectives. Introduce presenter(s).	10 min
2.	Main Room/ Content Overview	1st Learning Objective: Identify fundraising purposes and best practices. Facilitate discussion: What are the current fundraising purposes and best 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. See Breakout Discussion Questions	20 min
3.	Breakouts/ Discussions	2nd Learning Objective: Identify the role of Club President in club fundraising development. Facilitate Discussion: 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 just planning the project, but planning the leadership actions / communications to engage members for achieving a successful fundraising project.) Share the key steps.	20 min
4.	Breakouts/ Discussions	3rd Learning Objective: Evaluate fundraising options in light of perceived club culture Facilitate Discussion: 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? Share your three critical impacts.	20 min
5.	Sharing Back/ Q & A	Ask for good ideas to share and takeaways. Ask for any questions and respond briefly.	15 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	5 min

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.





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

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



TIME FRAME	TASKS
6-4 weeks before	<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



TIME FRAME	TASKS
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
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](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.



EVENT RESOURCES

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

OFFICIAL LOGOS



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.

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal blue lines across its entire width. The lines are thin and consistent in color, set against a plain white background. There are no margins, text, or other markings present on the page.

Module C-7 Shining A Spotlight On Your Rotary Club (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Provide topic – have participants open PETS Workbook, C-7: Shining A Spotlight On Your Rotary Club. Refer to the three objectives. Introduce presenter(s).	10 min
2.	Main Room/ Content Overview	1st Learning Objective: Identify public image purposes, best practices, and impacts. Facilitate discussion: What are the current public image purposes and best practices in your club? Which public image practices have done the most to promote the work of Rotary both within your club and within your community? What are your own public image best practices? What is your own Rotary impact story? List three keys to success. See Breakout Discussion Questions	20 min
3.	Breakouts/ Discussions	2nd Learning Objective: Identify the roles of Club President, public image committee, and individual Rotarians in enhancing the local image of Rotary. Facilitate Discussion: Have participants turn to handout Strategies Promoting Your Rotary Club. As Club President, how do you plan to engage club members to create a successful new public image campaign which will enhance the local image of your club? (Not just planning the campaign, but planning the leadership actions / communications to engage members for achieving a successful public image campaign.) Share the three key steps.	20 min
4.	Breakouts/ Discussion	3rd Learning Objective: Evaluate public image strategies, tools, and options in light of perceived club culture Facilitate Discussion: Refer to public image excerpts in your PETS Workbook. What is the common theme of these public image excerpts? What are the methodologies / tools / elements involved in a successful public image campaign? What makes a public image campaign right for your club and community? (No right answer.) How does a signature project, fundraising event, and public image campaign come together to foster an ongoing awareness of the impact of Rotary within your community? Share your three critical impacts.	20 min
5.	Sharing Back/ Q & A	Ask for good ideas to share and takeaways. Ask for any questions and respond briefly.	15 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	5 min

Lone Star P.E.T.S. 2025

PRESIDENTS-ELECT WORKBOOK

SATURDAY, MARCH 1, 2025

MODULE C-7 SHINING A SPOTLIGHT ON YOUR ROTARY CLUB

GOAL

Club Presidents will be able to provide leadership to enhance the public image of Rotary in their respective communities.

OBJECTIVES

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

1. Identify public image purposes, best practices, and impacts.
2. Identify the roles of club president, public image committee, and individual Rotarians in enhancing the local image of Rotary.
3. Evaluate public image strategies, tools, and options in light of perceived club culture

REFERENCE MATERIALS:

Key Points for Talking about Rotary
Strategies for Promoting Your Rotary Club
Public Relations Guide
People of Action Campaign Guidelines
People of Action Style Guide At A Glance
Logos



Module C-7: Shining A Spotlight On Your Rotary Club

Breakout Discussion Questions

1. What are the current public image purposes and best practices in your club?
Which public image practices have done the most to promote the work of Rotary both within your club and within your community?
What are *your own* public image best practices?
What is *your own* Rotary impact story?
List three keys to success.
2. Have participants turn to handout Strategies For Promoting Your Rotary Club. As Club President, how do you plan to engage club members to create a successful new public image campaign which will enhance the local image of your club? (Not just planning the campaign but planning the leadership actions / communications to engage members for achieving a successful public image campaign).
Share the three key steps.
3. Refer to public image excerpts in your PETS Workbook.
What is the common theme of these public image excerpts?
What are the methodologies / tools / elements involved in a successful public image campaign?
What makes a public image campaign right for your club and community?
How does a signature project, fundraising event, and public image campaign come together to foster an ongoing awareness of the impact of Rotary within your community?
Share your three critical impacts.
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 Public Image session?
6. Any other questions(s)?

KEY POINTS FOR TALKING ABOUT ROTARY



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

INTRODUCTORY PRIMARY MESSAGE

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

SUPPORTING MESSAGE

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

ABOUT ROTARY — PRIMARY MESSAGES

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

SUPPORTING MESSAGES

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

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

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

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

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

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

STRATEGIES FOR PROMOTING YOUR CLUB



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

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

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

PUBLIC RELATIONS

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

MEDIA RELATIONS

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

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

MARKETING

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

SOCIAL MEDIA

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

EVENTS

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

CLUB WEBSITE

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

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



ROTARY PUBLIC RELATIONS GUIDE

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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.

NEWS RELEASE

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



PEOPLE OF ACTION CAMPAIGN GUIDELINES

1 INTRODUCTION

- 1 Promote the public image of Rotary
- 2 What is the People of Action campaign?
- 2 Campaign materials overview

3 GET STARTED

- 4 Tell your club's People of Action story
- 5 Three steps to creating a print ad
- 8 Final print ad checklist
- 9 Identifying your club in the campaign

10 SHARE PEOPLE OF ACTION ADS WITH THE PUBLIC

- 11 Digital channels
- 12 Print and broadcast

14 CONTACT INFORMATION

What's new at the Brand Center?

Be sure to check back often, as campaign resource materials will be added regularly.



INTRODUCTION

PROMOTE THE PUBLIC IMAGE OF ROTARY

What is Rotary? This seemingly easy question has many different answers, depending on who you ask. The new Rotary public image campaign aims to provide a simple, consistent answer and rally Rotarians around a single idea: telling — and showing — the world that we are people of action.

Although most of the public knows our name, research tells us that too many prospective members or supporters do not fully understand Rotary. They don't know what we stand for or what we do in local communities. And the majority of those surveyed said they were unaware that a Rotary club exists in their own community.

It is up to all of us to tell Rotary's story. The People of Action public image campaign strives to bring Rotary to life for those who *don't* know us. It does this by showing Rotarians as the people of action we are: leaders who work together in communities to inspire, transform, connect, and celebrate what's possible. This campaign also engages and inspires current and prospective members, as well as donors, partners, and supporters.

Narrowing the gap between awareness and understanding will take time. With help from this guide, you'll find ways to let your community and the world know that we are people of action.

WHAT IS THE PEOPLE OF ACTION CAMPAIGN?

People of Action, our public image campaign, is more than advertising, it's the way we talk about ourselves. It is designed to build understanding of Rotary by answering:

- **What is Rotary?**
- **Who are Rotarians?**
- **What impact do Rotarians make in my community and around the world?**
- **How is Rotary different from other organizations?**

Through a variety of creative materials, the campaign shows Rotary club members as people of action. We know that Rotarians share a unique perspective and a passion for taking action to improve their communities and the world. Where others see despair, Rotarians see hope. Where others see problems, we see solutions. Where some might see challenges, we see opportunities.

This is our chance to show others how Rotary club members see what's possible in their communities and to highlight what we can achieve when we join together to bring those ideas to life.

CAMPAIGN MATERIALS OVERVIEW

People of Action materials are available in all official Rotary languages in the Rotary **Brand Center** (rotary.org/brandcenter). More resources will be added periodically, including:

- Videos
- Print ads
- Outdoor ads
- Online ads
- Radio ads and scripts
- Social media images
- Style guide
- Style guide at a glance
- Templates for creating your own print, digital, and social media ads that feature your club in action

Go to the **Get Started** section to learn how to tell your own People of Action stories and create local campaign materials.

2

GET STARTED

The People of Action campaign is about the difference Rotary and Rotaract clubs make in communities around the world. It was designed to help your club tell your story of local impact.

This campaign is for YOU.



TELL YOUR CLUB'S PEOPLE OF ACTION STORY

Use this exercise to start developing your own club story that will resonate with your community. Completing this worksheet will help make writing your ad easier and more effective. To begin, answer the following questions:

- 1.** What are we trying to accomplish?
Describe the problem or challenge in your community that your club is helping to solve.
How did you know it was an issue in your community?
- 2.** Who is our audience?
Who is your audience beyond Rotary members? What do they know about us?
What do they think and feel about us? What do we want them to think and feel?
- 3.** How did we take action?
Describe how you used the expertise of your club members or others in the community to tackle the challenge. What obstacles did your club face as you worked on this project?
- 4.** What action verb best represents the action you took? (Together, We Connect, Empower, End Polio, Fight Hunger, Inspire, Learn, Mentor, Promote Peace, Save Lives, or Transform)
- 5.** What photo will best illustrate your story?
What action is it showing? Who is in the photo?
- 6.** What was our impact? What evidence supports this?
- 7.** What were the outcomes of our project? How many people did the project affect?
What are some other relevant statistics? What changes resulted from the project?
- 8.** How did we touch the lives of people in our community?
Provide specific examples.
- 9.** What do we want our audience to do?
Learn more? Support your cause? Join you at an upcoming event?

THREE STEPS TO CREATING A PRINT AD

You've answered the important background questions, and you know the story you want to tell. Now it's time to create an ad that will best represent your club and your People of Action message — and grab the attention of your target audience. Here's a three-step process to develop a People of Action print ad that's specific to your club and community.



STEP ONE: SELECT AN ACTION VERB FOR YOUR HEADLINE

"Together, We ..." is part of the headline for this campaign and must be used in all People of Action ads. To finish the headline, select one of the predetermined action verbs that best represents your message. Think about what your club was trying to achieve, or how you approached the local challenge you decided to address. Which action verb best describes what you did? Please choose from the following list:

- Connect
- Empower
- End Polio
- Fight Hunger
- Inspire
- Learn
- Mentor
- Promote Peace
- Save Lives
- Transform

The predetermined action verbs have been cleared for legal purposes. To avoid legal issues, we highly recommend against creating and using other action verbs not found in this guide.



STEP TWO: CHOOSE AN IMAGE OR TAKE A PHOTO

Imagery is critical to showing that we are people of action. Through our images, we want to feature authentic moments of Rotarians working side by side with the community and project beneficiaries. Documentary-style photography generally meets this expectation better than portraits, handshaking, or group photos, which do not show Rotarians in action. Staged snapshots of people do not portray people of action.

To bring the campaign to life in the best way, depict your club in powerful images that capture the public's attention and ignite real emotion. This is what will make our campaign successful. Here's a checklist for how the photos should look and feel:

- The image represents genuine, unstaged moments of Rotarians at work.
- It shows a clear visual narrative that represents the headline.
- Subjects' faces and actions should be positive, happy, and engaging.
- Work with warm and natural lighting. Often, natural light in the early morning and late afternoon achieves the best results.
- Make sure you represent the diversity of your club in age, ethnicity, and gender. Highlight these qualities in your photos. You want people in your community to see themselves in the photo — this will help grab their attention.
- If the project has beneficiaries on-site, capture some images of Rotarians interacting with the beneficiaries to represent the work of the project.
- Ask yourself, "Will people in my community connect with what they see in the photo?"

You don't have to be a professional photographer to do this. When you're taking photos, just keep the following in mind: You want to use powerful images that capture your viewers' attention and inspire interest and an emotional reaction.

For more assistance with photography, download the **People of Action Style Guide** from the **Brand Center**.

Don't forget! Be sure to get signed, written permission from anyone in photos or videos used for Rotary purposes. Written consent should include the name of the subject and a statement that says they agree to being recorded and agree that the person recording them may use the recording. If children are in the photos, get written permission from their parents or guardians. If the photograph or video is taken by someone else, have that person license use to your club and make sure the subjects grant permission for you to use their images or voices.



Rotary unites dedicated professionals from the Golden area and around the globe with one common goal: to do more good. Like organizing a food program for more than 400 students in need so they arrive at school healthy and ready to learn. Helping to eradicate hunger in Golden, Colorado, that's what people of action do. Learn more at rotaryclubofgolden.org

STEP THREE: DEVELOP BODY COPY

The body copy, or the main part of your ad, will tell your story in a brief, informative, and inspiring way. This is where, in as few words as possible, you will:

- **Make your claim:** What did you do that was meaningful for your community? In the example ad on this page, the Rotary Club of Little Rock, Arkansas, USA, is helping reduce illiteracy rates in the area by donating dictionaries and promoting the value of reading to elementary students in the community every year.
- **Offer statistics or other proof of your impact:** How did you go about accomplishing your project? Provide evidence that your club took action to help others. Example: "Each year, the Rotary Club of Little Rock donates dictionaries and shares its love for reading with students in nearly 100 elementary school classrooms." While this is an ongoing project, the club offered proof of the work it's doing to improve literacy rates in the area.
- **Issue a call to action:** What do you want your audience to do when they see your ad? For example, "Learn more at littlerockrotary.com" prompts viewers to visit the club website and learn more about the Rotary Club of Little Rock, whether it's to get more information about the project or discover what Rotary is in general.

Keep in mind that you must cover these three essential elements in your body copy. Otherwise, your ad may come across as confusing, incomplete, or misleading.

To make sure you develop a clear and inspiring message, refer back to the **"Tell Your Club's People of Action Story"** worksheet to determine one or all of the following:

- What were the outcomes of your project?
- How many people did the project affect?
- What are some other relevant statistics?
- What changes resulted from the project?
- What specific examples show how you affected the lives of people in your community?

Don't forget to include your call to action, or the message that tells readers what you want them to do when they see your ad. Do you want them to learn more? Attend a meeting? Support your cause? Join your club?

Now it's time to start writing. Once you've answered the essential questions in "Tell Your Club's People of Action Story," refer to "Three Steps to Creating a Print Ad" to create your ad. Then use the design template in the **Brand Center** to combine your copy and the image you've chosen into a professional-looking ad. The final result should look similar to the ad shown on the left.

FINAL PRINT AD CHECKLIST



If you work through the three-step process, you will create a strong People of Action print ad. People of Action ads should always follow this framework:

- ☐ Your image
- ☐ Your action verb
- ☐ Your claim
- ☐ Your proof
- ☐ Your call to action

Now put the ad to the test. Can you answer yes to the following questions? If so, you are ready to create the final ad in the design template.

- ☐ Is my story tailored to my audience? Does it appeal to something important to them?
- ☐ Does it describe a transformation? Something meaningful?
- ☐ Do I offer proof of our impact?
- ☐ Have I included personal anecdotes, real-life examples, or stories that will touch my audience's emotions and grab their attention?
- ☐ Have I avoided Rotary jargon and acronyms?
- ☐ Is it short enough to keep my audience's attention?

Go to the **Share People of Action Ads With the Public** section to learn how to best place and promote your People of Action campaign materials.

IDENTIFYING YOUR CLUB IN THE CAMPAIGN



Club billboard

Location of
club identifier

Consistency is at the heart of the Rotary brand message and this campaign. It helps manage perceptions, instill confidence, and build on Rotary's collective successes. Consistency in the way you talk about Rotary and the way you portray Rotary's visual identity will ensure that we enhance the public's collective understanding of who we are.

You'll notice that there is no use of club logos in the People of Action campaign materials. However, you still have ways to identify your club throughout this campaign, and that's important. Showing your community that Rotarians are people of action, by bringing your local story to life, is a vital part of the campaign.

CLUB IDENTIFIERS FOR PEOPLE OF ACTION MATERIALS

Here are ways you can identify your club when creating People of Action materials:

- **Prints ads:** Refer to your club in the body copy and add your club website in the call to action section of your ads.
- **Out of home ads:** For these larger, outdoor ads such as billboards, work with a graphic design professional or the advertising vendor to insert your club name and website under the People of Action logo lockup on the right of the ad.
- **Digital ads:** If you're posting digital ads on your club's website, you don't need to refer to your club in the ads — viewers are on your site. If you're posting digital ads on other sites, use the premade ads in the Brand Center and provide a link to your club website.
- **Social media campaigns:** If you're posting a People of Action image or digital ad on your club's social media page, you don't need to refer to your club — viewers are on your page. But if you're posting to reshare with others, you can identify your club by selecting a headline to match your image and place the campaign logo lockup on the bottom of the ad. Instead of including your body copy and call to action in the ad itself, write them as part of your social media post. Be sure to link your call to action and use the #PeopleofAction hashtag to increase awareness.

Seek design and planning help, if needed. For additional design and planning assistance, contact a local graphic designer or agency. You can also download other People of Action campaign materials in the **Brand Center**, including the **Style Guide** and **Style Guide at a Glance**, for photography and design guidance. See the Club Public Image Committee Basics course in the **Learning Center** for more help with planning.



SHARE PEOPLE OF ACTION ADS WITH THE PUBLIC

Once you have selected the People of Action campaign ad you would like to use, or have completed the worksheets to create your own, you are ready to share it with the public.

To begin, organize a group of Rotarians with marketing experience to tailor the materials to your community, or work with a local graphic designer or agency. Just as important: Develop a plan to place your ads online and in traditional media such as newspapers, magazines, and billboards.

Be sure to use your Rotary connections while planning and placing your ads. If you or another club member knows someone in the media or advertising industry, ask that person to help you secure no-cost placements of the ads.

The best ad placements vary for each country, and for each community within that country. Read the following ideas and tips for placement.

DIGITAL CHANNELS



INTERNAL SHARING

Distribute your People of Action materials within the Rotary community.

- **Share campaign images on your Rotary club and district websites.** Club and district websites should include images from the new People of Action campaign. District websites can also explain how to access the campaign materials in the Brand Center. To post a campaign image on your website, simply download one of the People of Action banner ads from the Brand Center and follow your usual posting process.
- **Share campaign videos on the Rotary club and district websites.** To add a video to your club or district website, go to **Vimeo.org** to obtain a link for streaming and follow your website's posting process. You can also play the videos on a continuous loop at your Rotary events.
- **Place images in your Rotary newsletter.** Ask your newsletter editor to include the People of Action image that you'd like to share.

EXTERNAL SHARING

Show your People of Action materials to the public.

- **Post on social media.** Creating People of Action posts for your social media pages is simple. Think of how you told your story on the previous worksheet. Focus on *one* of these areas for each social media post. Your copy should be concise, focused, and easy to understand. To post images, follow these steps:
 1. Select the headline you used from the choices available.
 2. Select the image you used for your ad. You can add your own or choose from the images available.
 3. Write your post, keeping your copy concise and focused. Be sure to include a call to action, such as telling your audience to go to your club website and providing the link.
 4. Use the #PeopleofAction hashtag to increase discovery on your social media pages.

Encourage others to use the campaign materials. Post, send, and share all of your People of Action ads. Motivate other Rotarians to do the same within their communities. The more people raise awareness of Rotary, the more our communities will understand Rotary and the good we do. All the materials for the ad campaign, as well as other public image resources, will be in the **Brand Center**.

PRINT AND BROADCAST



Raising public awareness translates into more support for your projects, stronger links with other community organizations, and increased interest among potential members. Here are effective ways to increase awareness and understanding of what Rotary accomplishes in your community:

- **Place ads with your local newspaper, both in print and online.** Contact your local newspaper or use your media connections to try to secure no-cost placements of the People of Action ads. Ask if the newspaper will print the ad in an upcoming print edition and post it on the paper's website for a certain period of time.
- **Use out of home ads or give ads to local public transportation agencies.** Contact your local outdoor advertising vendor or the advertising department of your community's public transit agency to place the ads. You can also use your media connections to try to secure a low-cost ad placement. Work with the agency or vendor to get the ad printed. All People of Action billboards and out of home ads can be downloaded from the Brand Center.
- **Provide local shops with ads.** Ask if you can post print ads or leave brochures in local stores. Many business owners, if they're not already familiar with Rotary, are willing to help promote good causes and nonprofit organizations. Don't forget to ask club members who own businesses to display the ads as well.
- **Have your local radio station air an ad.** Here are some tips on how to customize the People of Action radio ads to promote your club:
 - Contact your local station or use your media connections to try to secure free placements of the People of Action radio ads. Offer the preproduced radio ads and a copy of the scripts — some stations may be willing to record the ads themselves.
 - The radio ad also has a split-audio feature, meaning the narration track is split from the other sounds, such as the background music. This allows a voice-over artist to rerecord the script in whatever language or dialect is appropriate.
 - Work with the radio station to select the right person to read the script. You want the person to sound confident, inspiring, and welcoming.
 - Localize the ad by including your club contact information.
For example: **Connect with the Evanston Lighthouse Rotary club at evlrc.org.**



- **Show the People of Action videos.** Here are some tips on how to customize the People of Action TV ads to promote your club:
 - Many television stations provide public service programs, short announcements, and messages — sometimes aired at no charge for community organizations like Rotary. Contact local stations and ask for the public service director or the community affairs director. Show them the video and ask them if they will air it for free.
 - Each video is available in two versions: 30- and 90-second spots that are ready to use, along with 25- and 85-second spots that leave 5 seconds at the end for you to add information about your local Rotary club or district. The 25- and 85-second spots can be localized with the help of the TV station or a video editing facility.
 - The 30- and 90-second videos are also available without a voice-over. These videos also have a split-audio feature, meaning the narration track is split from the other sounds, such as the background music. This allows a voice-over artist to rerecord the script in whatever language or dialect is appropriate.
 - If you use the 25- or 85-second versions, consider using the five extra seconds of blank space to add a message including the name of your club and your website. For example:

EVANSTON LIGHTHOUSE ROTARY CLUB
evlrc.org

- Ask the television station about including Rotary's digital ads in its online and social media platforms.
- **Additional ideas for low- or no-cost advertising:** Investigate whether there are opportunities for your club to advertise on parking meters, taxi boards, balloons, blimps, and grocery shopping carts, as well as community bulletin boards or at your local movie theater.



Don't forget to share; we want to hear your stories! Once you've launched a local People of Action campaign, tell us your story and show us pictures of how you used the ad materials. We may feature your work in internal global promotions. Write to our marketing staff at pr@rotary.org.

Go to the **Contact Information** section to find where to send any questions you have about People of Action.

CONTACT INFORMATION

Need help? Contact our marketing staff at pr@rotary.org with campaign questions or graphicdesign@rotary.org for design help.

Go to **Introduction** to return to the beginning of the document,
or go to rotary.org/brandcenter to start creating your own People of Action materials.



PEOPLE OF ACTION STYLE GUIDE AT A GLANCE

Overview

The People of Action campaign displays the true essence of who Rotarians are: leaders who work together in communities to inspire, transform, connect, and celebrate what’s possible. People who get things done and have a great time working, growing, and learning together.

People of Action comes to life through inspiring imagery and simple, compelling type treatment. This quick guide will help you give your People of Action materials the right look to show your community all of the good that your club does.

For more information about People of Action design, write to graphicdesign@rotary.org.



Graphic Elements

People of Action Lockup – Horizontal



People of Action Lockup – Stacked



Typography

Fonts are licensed and available for purchase.

Primary Font

Use all caps in bold style for “Together, We.”
Use medium style for body copy and calls to action.

Sentinel

ABCDEFGHIJKLMNOPQRSTUVWXYZ
PQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
vwxyz1234567890
Book
Medium
Bold

People of Action Headline Graphics

The headline graphics for this campaign contain “Together, We” plus a predetermined verb, which cannot be changed. The headline graphics below are to be used only within a layout from the campaign.



Colors

When using our color palette, be sure to apply the appropriate formulations listed on this page. Our colors should not be screened or adjusted.

Royal Blue PMS 286C C100 M80 Y9 K2 PMS 286U C100 M92 Y9 K2 Hex #17458f R23 G69 B143	Gold PMS 130C C0 M41 Y100 K0 PMS 129U C0 M35 Y100 K0 Hex #f7a81b R247 G168 B27
Azure PMS 2175C C99 M47 Y0 K0 PMS 2175U C99 M53 Y0 K0 Hex #005daa R0 G93 B170	White C0 M0 Y0 K0 Hex #ffffff R255 G255 B255

Secondary Font

Use strictly for action verb. For adjustment guidelines and instructions, contact graphicdesign@rotary.org.

PERMANENT MARKER

ABCDEFGHIJKLMNOPQRSTUVWXYZ
PQRSTUVWXYZ
ABCDEFGHIJKLMNOPQRSTUVWXYZ
vwxyz1234567890
REGULAR

Tertiary Font

Use altered all caps in black italic style for the People of Action lockup only.

Frutiger

ABCDEFGHIJKLMNOPQRSTUVWXYZ
PQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
vwxyz1234567890
Black Italic

Photography

Use photos that capture action. Feature the people who benefit from the work you do in your communities.

Style Checklist

Photos must:

- Represent real-life, everyday moments
- Show a clear visual narrative that pertains to the headline
- Be inspiring and aspirational
- Have warm lighting and natural colors

Photos should:

- Represent the diversity of the club and its community
- Include two or more people
- Use interesting camera angles or cropping
- Have a sense of motion



Logo Formats

Print	.eps	spot or cmyk
Word doc (print)	.png	rgb
PowerPoint	.png	rgb
Digital (web, email, mobile)	.png	rgb

Club, District, and Zone Websites

JANUARY 2021

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

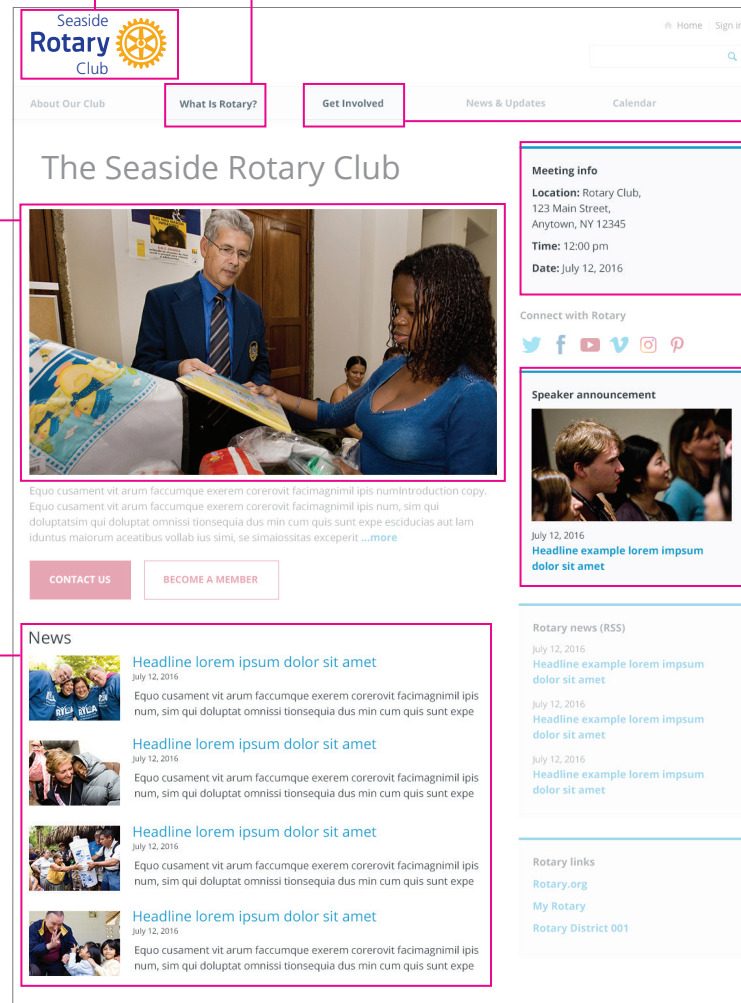
Use photos that tell a story and that focus on relationships and community impact. Whenever possible, they should show more than one Rotary member and reflect our diversity.

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

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

Examples:



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.

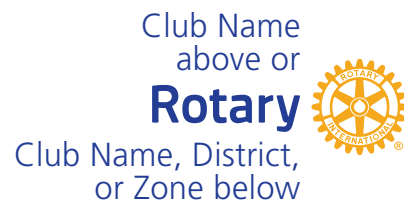
Find templates for creating your logo on the Brand Center at rotary.org/brandcenter.

Reverse Options



CLUB, DISTRICT, OR ZONE LOGOS

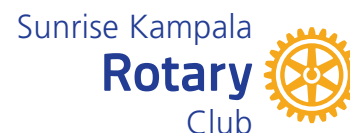
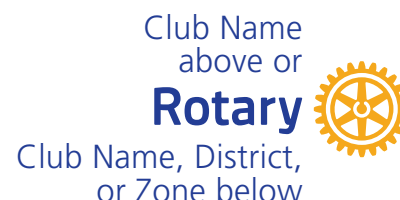
Masterbrand Signature



Examples



Masterbrand Signature Simplified



Rotaract Masterbrand Signature



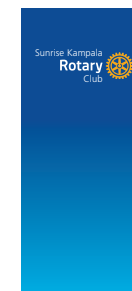
Examples



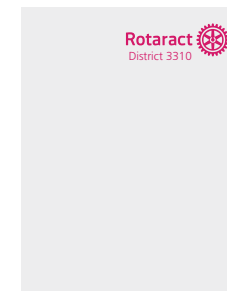
Rotaract Masterbrand Signature Simplified



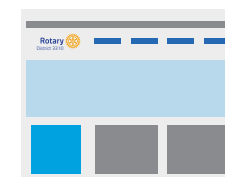
Layout Examples



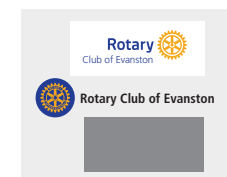
club brochure



flyer



website



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

Clear Space



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

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

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

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

RESOURCES

BRAND CENTER:
rotary.org/brandcenter

LEARNING CENTER:
rotary.org/learn

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

SUPPORT CENTER:
rotarysupportcenter@rotary.org

CHECKLIST

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

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

LOCKUPS

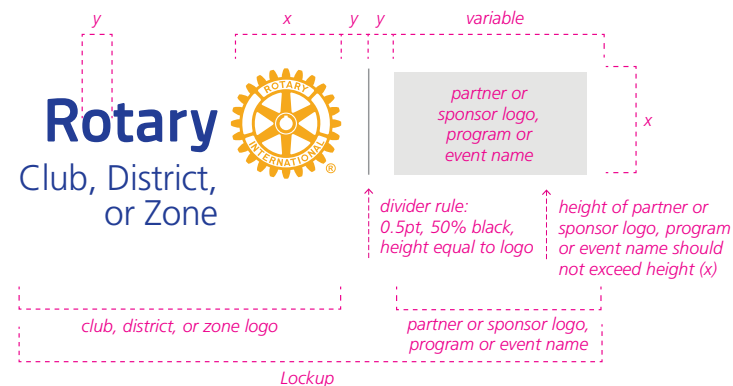
Logo Lockup Examples



Word Lockup Examples



Lockup Construction



NAMING PROJECTS OR EVENTS

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



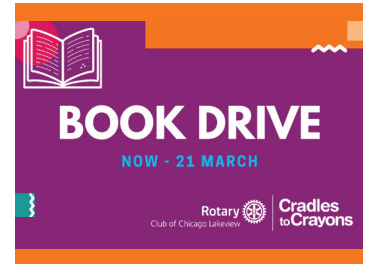
Club logo on installation



Multiclub sign



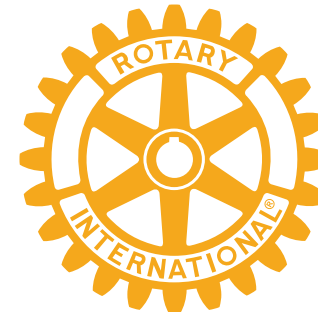
Rotaract club event



Rotary club event

MARK OF EXCELLENCE

The Rotary wheel is the Mark of Excellence (MOE) and should be considered the secondary logo. When you use 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 here. Information about Rotary's color palette can be found on the Brand Center.

[illegible]

Module C-8 Identifying And Leading Change For Progress Sake (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Provide topic – have participants open PETS Workbook, C-8: Identifying and Leading Change for Progress Sake. Reflect on the reaction to change: How do people react to change? What makes you feel better about making a change? We are laying the groundwork for formulating an action plan for leading change.	10 min.
2.	Main Room/ Content Overview	1st Learning Objective: Identify attributes of a vibrant Rotary club. Refer to the Be A Vibrant Club brochure and Flexible options for clubs and Club Models handouts in your PETS Workbook. Facilitate Discussion: What makes a vibrant club? Read p. 4 of brochure. How do you know if your club is making progress towards being vibrant? How can you use the flexible options and new club models to make progress towards being vibrant? See Breakout Room Questions	15 min
3.	Breakout Room/ Discussions	2nd Learning Objective: Recognize the Club President's role in leading changes to be a vibrant club. Refer to both Leading Meaningful Change resource page and A Model For Change Planning chart in your PETS Workbook. Facilitate Discussion: As Club President, in what ways can you promote change within the club? Which steps of leading change are most challenging to accomplish?	20 min
4.	Breakout Room/ Discussions	3rd Learning Objective: Articulate insights about their club culture, diversity, and change. Refer to the Rotary Diversity, Equity, and Inclusion information and the diversity assessment tool in your PETS Workbook. Facilitate Discussion: What can you do as Club President to inspire change in order to build a diverse and representative club membership to make an impact in your community? List three key points.	20 min
5.	Charting Change/ Sharing Back/ Q & A	After reviewing the Change literature and sharing in your breakout discussion groups for this Change module, it is time to start formulating your action plan for change in your club during your year as Club President. Facilitate Discussion: List three critical areas of needed change for your club. List one action step for each change area. Share back with your group. Make sure to get feedback from group members.	20 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring week with acknowledgements for their upcoming year of service as club president/club president-elect. Ask them to go to notes page at end of module and jot down their thoughts. Point out Your PETS Experience: Final Takeaways questions to answer on their own time. Remind participants to complete module evaluation via mobile app. Proceed with transition to completion of program -- keynote speaker and District meetings.	5 min

Lone Star P.E.T.S. 2025

PRESIDENTS-ELECT WORKBOOK

SATURDAY, MARCH 1, 2025

MODULE C-8

IDENTIFYING AND LEADING CHANGE FOR PROGRESS SAKE

GOAL

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

OBJECTIVES

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

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

REFERENCE MATERIALS

Club Flexibility FAQ

Club Types, Formats, and Models Matrix Flexible Options for Clubs

Leading Meaningful Change

Model for Change Planning

Our Commitment to Diversity, Equity, and Inclusion

Rotary's Framework for Diversity, Equity, and Inclusion

Diversity, Equity, Inclusion, and Code of Conduct

A Diversity Assessment



Module C-8: Identifying and Leading Change For Progress Sake

Breakout Discussion Questions

1. Refer to the Be A Vibrant Club brochure included in A-1 and Flexible options for clubs and Club Models handouts in your PETS Workbook.
What makes a vibrant club?
How do you know if your club is making progress towards being vibrant?
How can you use the flexible options and new club models to make progress towards being vibrant?
2. Refer to both Leading Meaningful Change resource page and A Model For Change Planning chart in your PETS Workbook.
As Club President, in what ways can you promote change within the club?
Which steps of leading change are most challenging to accomplish?
3. Refer to the Rotary Diversity, Equity, and Inclusion information and the diversity assessment tool in your PETS Workbook. What can you do as Club President to inspire change in order to build a diverse and representative club membership to make an impact in your community. List three key points.

Club flexibility FAQ | My Rotary

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

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

Meeting format

In what ways are clubs changing their meeting format?

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

What are the advantages of changing the meeting format?

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

Meeting frequency and attendance

How frequently should clubs meet?

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

do so.

Are clubs allowed to remove attendance requirements?

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

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

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

Membership types

What membership types exist?

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

What's the difference between active and honorary members?

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

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

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

How do corporate memberships work?

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

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

How do family memberships work?

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

How do associate memberships work?

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

How do younger professional memberships work?

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

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

Are Rotaractors now also Rotarians?

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

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

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

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

Club models

What Rotary club models are there?

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

How does a satellite club work?

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

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

How could my club benefit from creating a satellite club?

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

Are satellite club members equal to Rotary club members?

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

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

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

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

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

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

What are passport clubs?

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

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

How many passport clubs is a district able to have?

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

CLUB TYPES, FORMATS, AND MODELS



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

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

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

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

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

CLUB TYPES, FORMATS, AND MODELS



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

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

CLUB TYPES, FORMATS, AND MODELS



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

Want to offer more flexibility but not sure where to start?

Select one of these options that describes the most pressing challenge your club faces, and find solutions and resources to help.

- [My club does not reflect our community when it comes to gender, profession, ethnicity and age.](#)
- [People have trouble making it to our meeting because of its time or location.](#)
- [We have trouble attracting members because people are too busy or the cost is too expensive.](#)
- [We are losing members because they have different interests and experience levels.](#)
- [We have trouble finding new members because we do the same service project every year.](#)
- [We lose potential members because family members aren't welcome at our meetings and events.](#)
- [It is challenging to find new people to lead our club.](#)

Start a new type of club

Rotary clubs are autonomous and all have their own culture. You can create a club that offers a club experience that works for you and others with similar needs. For example, you could start a satellite club for your less traditional members and your traditional members can remain in the sponsor club.

Benefits:

- Creates new opportunity for prospective members in your area
- Allows disengaged members to try new practices and ideas
- Creates opportunity for new leadership
- Allows members in traditional clubs to continue if they enjoy their club experience

Resources:

- [Rotary club models](#) (PDF)
- [Guide to satellite clubs](#) (PDF)
- [Guide to passport clubs](#) (PDF)
- [Practicing Flexibility and Innovation](#) (online course)
- [Story – A club built from scratch focuses on service](#) (Rotary Club of Seaford, Australia)
- [Club models FAQs](#)

Offer alternative membership types

Your club could offer family memberships, junior memberships to young professionals, or corporate

memberships to business leaders and their employees. Each type of membership can have its own policies on dues, attendance, and service expectations, provided these policies are documented in your club bylaws. Rotary will count these people in your club membership and will consider them active members if they pay RI dues.

Benefits:

- Presents options for prospective members with different pricing structures and levels of time commitment
- Presents an opportunity to partner with a local corporation
- Diversifies club by attracting businesses, prospective members with young families, and other groups who aren't able to join as traditional members

Resources:

- [Guide to corporate membership](#) (PDF)
- [Start Guide for Alternate Membership Types \(includes sample bylaws\)](#) (DOC)
- [Practicing Flexibility and Innovation](#) (online course)
- [Story – Corporate Citizens](#) (Rotary Club of DeMotte-Kankakee Valley, Indiana)
- [Membership types FAQ](#)

Change meeting format

Change your meeting format and engage your members in fun, productive ways! You can meet in person, online, or a combination, including letting some members attend in-person meetings through the Internet. Or you can change the format of your in-person meetings to include service projects, leadership development, committee reporting, social gatherings, member professional talks, and educational talks on diversity, club vision, and other topics your club determines.

Benefits:

- Makes club meetings more interesting, which engages members and guests
- Creates culture where agility and creativity are valued and demonstrated
- Members can gain professional development skills

Resources:

- [Start Guide for Flexible Meeting Formats \(includes sample bylaws\)](#) (DOC)
- [Leadership in Action: Your Guide to starting a Program](#) (PDF)
- [Story – Happy wanderers](#) (Rotary E-Club of Australian Nomads)
- [Story – 3 Meeting Formats that Increased Member Participation](#) (Rotary Club of Rochester, Minnesota) (Audio)
- [Meeting format FAQs](#)

Relax attendance expectations / reduce meeting frequency

Change your meeting schedule to make it easier for your members to attend.

Ease attendance requirements and encourage members to participate in other ways, such as taking a leadership role, updating the club website regularly, running a meeting a few times a year, or planning an event. Remember your members are volunteers. If your club is dynamic and offers a good experience for members, attendance won't be a problem.

Benefits:

- Accommodates members who have busy schedules
- Encourages participation outside of in-person meetings
- Better captures member engagement
- Makes club more appealing to prospective members (research tells us that rigid rules keep non-members from joining)
- Diversifies club if other nontraditional groups are motivated to join
- Compels clubs to make good use of meeting time (so members come because they want to not because they have to)

Resources:

- [Meeting frequency and attendance FAQs](#)
- [Guide to passport clubs](#) (PDF)
- [Practicing Flexibility and Innovation](#) (online course)
- [Story – Meeting flexibility attracts young professionals](#) (Rotary Club of Invercargill, New Zealand)

Resources & reference

- [Club Planning Assistant](#) (interactive form)
- [Practicing Flexibility and Innovation](#) (online course)
- [Rotary Club Models](#) (PDF)
- [Guide to Satellite Club](#) (PDF)
- [Satellite club FAQ](#) (PDF)
- [Satellite club application](#) (PDF)
- [Satellite club member information form](#) (PDF)
- [Guide to Corporate Membership](#) (PDF)
- [Corporate Membership: Making the offer](#) (DOC)
- [Corporate Membership: Sample Bylaws](#) (DOC)
- [Guide to passport clubs](#) (PDF)

- [Sample passport club bylaws \(DOC\)](#)
 - [Membership Flexibility Overview \(DOC\)](#)
 - [Rotary's governance documents](#)
 - [Start Guide for Alternate Membership Types \(includes sample bylaws\) \(DOC\)](#)
 - [Start Guide for Flexible Meeting Formats \(includes sample bylaws\) \(DOC\)](#)
 - [Club flexibility Frequently asked questions](#)
-

Leading Meaningful Change

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

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

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

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

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

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

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

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

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

Why do some changes fail?

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

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

NOTES:



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. Although the Rotary experience may differ from country to country, issues of diversity, equity, and inclusion are globally relevant.

We embrace the principles of diversity, equity, and inclusion. 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. Through the work of our [Diversity, Equity, and Inclusion Advisory Council](#), we are taking action to follow these principles in everything we do.

Understanding DEI at Rotary

In 2021, we 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 to develop our [DEI framework](#).

We are currently using the findings from our second DEI survey to strengthen our established framework and continue to drive our work forward.

How we're committed to DEI

The foundation of our focus is our [DEI commitment statement](#).

The [DEI code of conduct](#) provides a supportive framework for how Rotary members can create and maintain an environment that is collaborative, positive, and healthy for everyone. It 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, while also holding others accountable for what they say and/or do.

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, talk to the person directly. Very often, a person who said something or acted in a way that made you/others feel excluded, marginalized, or targeted did not do so intentionally. Although there might be mistakes, missteps, and uncomfortable conversations along the way, there is also the opportunity for learning and growth and the end result is a better, stronger Rotary.
- If a discussion is not possible, report the incident to your club or district leadership. If the situation involves someone in a leadership role or from 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, programs and community

- 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](#)
- Promote diversity, equity, and inclusion in your club by:
 - Talking about the benefits of a diverse and inclusive club with your fellow club members and using the [Diversifying Your Club](#) assessment to create a member diversity and inclusion plan.
 - Inviting local diversity, equity, and inclusion experts to speak to your club.

To connect with your District DEI Chair or a member of the Rotary Diversity, Equity, and Inclusion Advisory Council, contact dei.inquiries@rotary.org.

- Connecting with organizations that support DEI efforts and working with them on projects or events.
 - Seeking out new voices when you're making appointments and encouraging people who have been underrepresented in these roles to take on leadership positions.
 - Holding conversations about diversity, equity, and inclusion. It's important to acknowledge that this can be uncomfortable and very personal. Establish the expectation that everyone must remain respectful so each person can learn and be heard.
 - Appointing a DEI Chair or creating a club DEI committee that focuses on identifying collaborative learning, sharing, and service opportunities.
 - Design inclusive youth programs that instill long-term belonging in Rotary by:
 - Supporting Rotary Youth Exchange students of varying sexual orientations with the guide: [Diversity, Equity, and Inclusion in Rotary Youth Exchange: Supporting Lesbian, Gay, Bisexual, Transgender, and Queer \(LGBTQ+\) Exchange Students](#)
 - Increasing youth voice by learning how to create a youth advisory council for your district or zone in these [10 steps](#) (PDF).
 - Incorporating the DEI tips highlighted throughout the [Interact](#) and [RYLA](#) handbooks into your local Interact and RYLA programs.
 - Applying the concepts of youth voice and positive youth-adult partnerships from our webinar recording, [Expanding Reach: Partner with Youth in Service](#).
 - [Expanding girls' skills, rights, and opportunities to lead](#)
-



ROTARY'S FRAMEWORK FOR DIVERSITY, EQUITY, AND INCLUSION

Rotary strives to create and maintain an experience for members and participants that reflects our fundamental values, empowers people to contribute at their fullest potential, and celebrates people as they are. Our core values — service, fellowship, diversity, integrity, and leadership — align with our commitment to foster a diverse, equitable, and inclusive environment for all.

To assess the state of diversity, equity, and inclusion (DEI) at Rotary, we worked with specialists at PricewaterhouseCoopers, a global network of professional services firms. As part of this, we:

- Reviewed Rotary's documented policies and procedures
- Conducted focus groups and interviews with Rotary leaders and members
- Analyzed 31,000 responses to a global survey to understand the sentiments and experiences of our members
- Used DEI Task Force meetings to build support among Rotary leaders and develop a path forward

This assessment has become the basis of the framework that we'll use to further integrate DEI into all aspects of our culture, including welcoming more diverse members, building a more inclusive culture, and providing more equitable opportunities.

Eight key themes emerged from the assessment. We've already begun to address some of these and will use them all to guide our work to improve diversity, equity, and inclusion in Rotary.

1. Members are invested in making Rotary a more diverse, equitable, and inclusive organization in order to grow our membership and increase our impact.

Our members guide our actions. We'll continue to respond to your interest and belief in DEI by making Rotary a more diverse, equitable, and inclusive organization for everyone.

2. Rotary's current DEI policies and procedures vary by region, leading to inconsistent and inequitable experiences.

We're now emphasizing inclusive leadership expectations, where our leaders think and act more inclusively — and creating DEI training for club, regional, district, and senior leaders to ensure more consistency in people's experiences. This includes training our leaders about DEI, expecting them to model the behavior outlined in the DEI Code of Conduct, and asking them to apply the code so that all members recognize the effect their words and actions have on others.

3. Members don't have enough information or insight about our efforts to be more diverse, equitable, and inclusive. We discovered a lack of awareness about our DEI commitment statement, training courses, and webpage.

We've created a hub on [My Rotary](#) where you can learn more about our action to incorporate diversity, equity, and inclusion into all that we do. You can download and share resources such as the DEI Code of Conduct, terms and definitions, and Rotary's commitment statement. You can also find links to Learning Center courses to expand your knowledge about DEI and find suggestions about how your club can support DEI locally. We'll promote this page and other

resources in all of our communication channels to bring you the most up-to-date information.

- 4. More than 25% of the survey respondents said they don't know how to report discrimination or harassment at Rotary. Some members also noted the lack of a central place to report, collect, or address instances of this behavior. Members said some incidents go unreported and some inappropriate behavior incurs no consequences.**

The goal of the DEI Code of Conduct is to be clear about how Rotary members are expected to conduct themselves in order to create and maintain collaborative, positive, and healthy environments. This means we expect all members to use respectful language, be supportive, foster a welcoming and inclusive environment, and celebrate diversity.

In any instance when a member acts in an unsupportive or unwelcoming manner, or anytime you experience or witness behavior that doesn't align with the DEI Code of Conduct, you can contact cds@rotary.org. Rotary staff will review your report and follow up appropriately.

- 5. More than 30% of the survey respondents said they don't believe that Rotary leaders are actively promoting DEI. They said they don't see Rotary leaders being held accountable, and they don't believe those leaders uniformly apply or uphold Rotary's DEI principles.**

All Rotary leaders are expected to uniformly apply and uphold the DEI Code of Conduct. If you experience or witness behavior from a Rotary leader that doesn't align with the code, you can contact cds@rotary.org. Rotary staff will review your report and follow up appropriately.

- 6. Members believe that leadership opportunities are limited for anyone who doesn't fit the traditional profile of a Rotary leader. They said members who don't look or behave in a certain way or have the "right" Rotary resume don't have the same opportunities to advance.**

Rotary International's Board of Directors has reviewed and updated the qualifications for some key leadership roles, including the International Assembly moderator and regional leaders, in order to welcome more diverse voices. For the first time, a Rotaractor has been appointed to serve as a Rotary public image coordinator in 2022-23.

We'll continue to seek opportunities to make leadership roles more accessible.

- 7. The cost of joining Rotary remains an obstacle to retaining members, attracting new ones, and accurately representing our communities. When we welcome only those with the financial means, we exclude community members who want to make a difference but can't afford to join.**

We want to ensure that the cost of Rotary is commensurate with the value of being a member. But we don't want cost to keep potential people of action from connecting and making a difference through Rotary. We'll explore more ways to make Rotary accessible to more people who want to create change in their communities.

- 8. Younger members, particularly Rotaractors, said they don't have a pathway to leadership and aren't offered meaningful opportunities to get involved, showcase their ideas, or take part in making decisions because of their age or perceived lack of experience.**

Since the 2019 Council on Legislation voted to include Rotaract clubs as a distinct membership type in Rotary International, we've incorporated Rotaract into our operational processes and strategic initiatives. We're in the process of ensuring that Rotaractors participate in leadership

development efforts and have access to other products and services for members, as well as to our grants, giving, and fundraising efforts.

In addition to these themes, we'll center our efforts on *managing change, strengthening governance and accountability, training and educating leaders, reporting and escalating issues, and engaging marginalized groups*. The DEI Task Force will keep using the feedback from the member survey to create meaningful change throughout our organization that enhances the Rotary experience for all members and participants. We'll update you about our progress periodically.

Cultivating a diverse, equitable, and inclusive culture is essential to realizing our vision of a world where people unite and take action to create lasting change. We are committed to this path, and with your support, we can grow and strengthen Rotary for the next generation of people of action.

Write to dei.inquiries@rotary.org with questions.



DIVERSITY, EQUITY, AND INCLUSION CODE OF CONDUCT

Rotary core values: fellowship, integrity, diversity, service, and leadership

This code of conduct reflects our core values and explains the responsibility that comes with being a Rotarian and Rotaractor, which includes members from nearly every country in the world, speaking over 100 different languages. We are committed to upholding and evolving this code as our organization grows.

Like our core values, we expect Rotarians and Rotaractors to exemplify this code of conduct as they interact with one another, Rotary program participants, Alumni, project partners, and members of the community. Specifically, the code of conduct applies at all club, district, zone, and Rotary International meetings, trainings, events, and anywhere else a member represents Rotary and on My Rotary and social media.

Expectations

All club members and other participants including Rotary program participants, Alumni, project partners, and representatives of Rotary are expected to comply with this code of conduct, be considerate and contribute to a collaborative, positive, and healthy environment in which all are respected and valued.

USE RESPECTFUL LANGUAGE

- When you first meet someone, introduce yourself and explain how you would like to be addressed, including your preferred pronouns (he/him/his, she/her/hers, they/them/theirs). Call others by their preferred name, rather than using a nickname that is easier to pronounce.
- When addressing larger groups, utilize gender neutral words to avoid gender assumption.
- Use active listening to deepen your understanding of others.
- Be conscious of language use and adapt depending on region. Some wording is acceptable in some cultures but unacceptable in others.
- Avoid slang or idioms that do not translate across cultures or be deliberate in explaining them to share our diverse cultures and languages.
- Speak plainly and avoid acronyms and jargon that not everyone may understand.
- If you are curious about someone's cultural background, faith, sexual orientation, gender, or another characteristic, ask if they are open to sharing more about themselves. Refrain from asking if the topic is not relevant to your conversation.
- Foster an atmosphere of intergenerational dialogue and avoid describing anyone by their age.

BE SUPPORTIVE

- Be an ally and advocate for others and be ready to intervene when you see a need.
- If you see or hear something inappropriate, address the behavior in a way to offer support to those affected.
- As a member of Rotary, uphold the Code of Conduct, build this culture within your club experience, and address any issues as they arise.

FOSTER A WELCOMING AND INCLUSIVE ENVIRONMENT

- Ensure every member and participant can fully engage in any meeting, event, or activity that you organize in person or online by offering an accessible venue, simultaneous interpretation, closed captioning and/or transcripts, and other resources as needed.
- Review any club or program traditions and stop or change activities that may be offensive or alienating to a specific group.
- Create a welcoming environment and include all in conversations, projects, and events.
- As much as possible, pay attention to nonverbal communication such as eye contact, facial expressions, tone of voice, personal space, gestures, and posture, and how it impacts your ability to engage with and relate to others.
- Know the important dates of various religions and schedule events and activities in a way that is inclusive and considerate of people who observe them.
- Be aware of people's dietary and health restrictions.
- Open opportunities for everyone to hold leadership roles in your club and district or engage with your community partners.

CELEBRATE DIVERSITY

- Increase your club's awareness, understanding, and acceptance of people with disabilities.
- Celebrate a variety of cultural events and religious observances, rather than continually conducting service projects or hosting events associated with a single culture or religion.
- Acknowledge and celebrate significant dates relevant to diversity.
- Avoid stereotyping and mocking any specific group.
- Acknowledge and celebrate different genders.

Code of Conduct Questions and Concerns

For questions or concerns regarding the code of conduct or behavior that goes against the code of conduct, email DEI.Inquiries@rotary.org.

Adult Harassment Issues

Per the Rotary Code of Policies, Rotary currently maintains the following to report issues of harassment involving Rotarians or Rotaractors at meetings, events, or activities:

Rotary is committed to maintaining an environment that is free of any form of harassment, broadly defined as any conduct, verbal or physical, that denigrates, insults, or offends a person or group based on any characteristic¹ (age, ethnicity, race, color, disability, religion, socioeconomic status, culture, sex, sexual orientations, or gender identity).

If you are notified of any allegation of harassment involving an adult, or you feel you have been harassed, follow these steps:

1. If anyone's safety is in doubt, contact local law enforcement.
2. Notify a club officer (club president or secretary), district leader (district governor or district governor-elect), or zone leader (RI director).
3. Report the incident to Rotary International's Club and District Support team by contacting [cgs@rotary.org](mailto:cds@rotary.org).
4. Any allegation of harassment or abuse that involves young people must be reported to Rotary International at youthprotection@rotary.org within 72 hours.

¹ Characteristics listed here are from the Rotary Code of Policies, Harassment-free Environment at Meetings, Events, or Activities. As the Rotary Code of Policies is updated, this Code of Conduct section will be updated.

UNDERSTANDING HOW YOUR CLUB REPRESENTS YOUR COMMUNITY: A DIVERSITY ASSESSMENT



Rotary is committed to diversity, equity, and inclusion (DEI). Thinking about whether your club is diverse means evaluating how well it reflects factors such as the different ethnicities, ages, and professions in your community and whether it has an appropriate gender balance. This assessment will help you identify people, skills, and experiences that are underrepresented in your club and develop a plan to address that. It's equally important to provide the support each person needs so they can have the same kind of experience, which is what we mean by equity. We always want to create a culture of inclusion, where people's differences are respected, supported, and valued.

WHAT YOU'LL GAIN

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for diversifying your club
- Make adjustments so that your club better represents the community

GETTING ORGANIZED

Learn more about diversity and Rotary's recommendations for your club by taking these courses in the Learning Center: [Creating an Inclusive Club Culture](#), [Microaggressions](#), and [Diversifying Your Club](#). Then plan how you'll carry out the assessment, such as by dedicating time at a series of club meetings to each step of the process. Use the Club Action Plan in appendix 1 to track your progress.

Choose a facilitator (such as a DEI expert outside your club) who is comfortable talking about diversity and why it's important. This activity should involve all club members so that everyone has a stake in the process. Including your club members in this process now will increase awareness and support for more action in the future.



Diversifying your club isn't just about changing the mix of people. It also needs to involve making everyone feel valued and welcome, or they won't stay with Rotary.

GETTING STARTED

Step 1: Discuss the advantages of having diverse members.

Talk about the benefits of diversity and celebrate how it has helped you in the past. For example, highlight a project that was more successful because it involved members with diverse professional skills. Or acknowledge a member who identified a club bylaw that could exclude some people and talk about how your club changed it. Discuss how diverse perspectives aid your club's ability to address local needs. Reflect on your club's representation by profession, gender, age, ethnicity, and culture in your community.

Step 2: Collect information.

At the next meeting, summarize your previous discussion and briefly reiterate the positive effects of having diverse members. Explain that the next step is researching your community's demographics so that you can better understand your community's composition by age, gender, ethnicity, income levels, sexual orientation, and more. Distribute the Member Diversity Worksheet. Split club members into groups and ask each group to gather the specified information and complete what they can of the worksheet before the next meeting. You could organize the groups this way:

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

Step 3: Discuss the findings within each group.

At the following meeting, ask each group to discuss what it found, share what it completed on the worksheet, and compile the findings. Then have each group choose a representative to present its data to the club later on. The goal is to have reliable data about the diversity in your community.



Remember as you try to assess the diversity in your club and community that there is a lot of nuance. People can belong to more than one ethnic group or have disabilities that aren't evident. Avoid making assumptions, such as about someone's sexual orientation or gender identity.

Step 4: Report the results and discuss their implications.

Give each group about five minutes at a club meeting to present its findings. Lead a discussion about the information and what it shows.

Talk about whether your club's members reflect:

- The ages of your area's population
- The gender composition of the community's working professionals
- The ethnic and cultural diversity of the community
- The varied socioeconomic levels of the community
- The various types of professions in the community
- The proportion of professionals who have disabilities



Be sure to allow enough time when you're planning the schedule. Each step can take a week or longer.

Step 5: Develop a member diversity action plan.

Now that you've determined who is underrepresented in your club, find ways to connect with these members of your community. You could invite someone to speak to the club about their perspective on the area and the issues you might work on together. Ask people about their experiences and if they are willing to share what they believe the community needs. Determine their interest in joining, how they could contribute to your club, what your club could offer them, and how your club could accommodate their needs. Document your plan and assign tasks to people on the membership committee or other club members. Set goals for how you want to diversify your club, monitor your progress, and keep club members updated.

Want to do other assessments?

[Member Interest Survey](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

[Exit Survey](#)

Use the Club Action Plan in appendix 1 to track your membership efforts.

MEMBER DIVERSITY WORKSHEET

1. What sources did you consult to find data about your community's demographic composition?

2. What data did you find about:

Age:

Gender:

Nationalities (what countries are represented?):

Ethnic background:

Professions:

Sexual orientation:

People with disabilities:

Socioeconomic status:

3. Does this data correspond to the current composition of your club? Explain your evidence.

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

5. What surprised you the most?

6. What surprised you the least?

7. Which demographic groups are underrepresented in your club?

8. What can your club do to better represent your community?

9. Do you think people from groups that are currently underrepresented would feel welcome in your club?

10. What do your club materials, website, and social media posts show about your club's diversity?

11. How can you integrate your findings into a plan of action?

[illegible]

All Modules: Your PETS Experience: Final Takeaways

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

Discussion Questions

Takeaways For Your Club

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

Takeaways For Yourself

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

Most Impactful Takeway

5.

[illegible]