

Module A-2 Striving To Be A Vibrant Rotary Club (60 minutes)

| | Step? | We want to accomplish? | How long? |
|----|----------------------------------|--|-----------|
| 1. | Introduce Topic and Presenter(s) | Direct attention to the PETS Workbook, A-2: Striving To Be A Vibrant Rotary Club. Refer to the three learning objectives. Introduce presenter(s). | 3 min |
| 2. | Main Room/ Content Overview | Presentation of key content (slide deck can serve as outline and handout for notes). Introduce Rotary Road Map. Stress the importance of setting three-year goals and entering them into Rotary Club Central. Share how to develop a Club Action Plan based on goals set. Refer to the Rotary Citation/Club Excellence Award as a primary planning tool. | 10 min |
| 3. | Breakouts/ Discussions | <p>1st Learning Objective: Introduce the Rotary Roadmap. Stress the importance of the goal planning process for setting goals and developing action plans for the club.</p> <p>2nd Learning Objective: Explain the benefits of having an action plan in maintaining a vibrant club.</p> <p>3rd Learning Objective: Describe how to use the Rotary Citation/Club Excellence Award in preparation for completing Rotary Club Central information.</p> <p>See Breakout Discussion Questions</p> | 30 min |
| 4. | Sharing Back | Ask for good ideas to share and takeaways. | 10 min |
| 5. | Q & A | Ask for any questions and respond briefly. | 5 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. | 2 min |

Lone Star P.E.T.S. 2025

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

FRIDAY, FEBRUARY 28, 2025

MODULE A-2 STRIVING TO BE A VIBRANT ROTARY CLUB

GOAL

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

OBJECTIVES

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

1. Outline the **three-year goal** planning process for setting goals and developing action plans for the club.
2. Introduce the **Rotary Regional Roadmap for Zones 25B and 29** and **Rotary Club Central** as the primary sources for goal setting for a club.
3. Explain the benefits of an action plan in maintaining a vibrant club.
4. Describe how to use the Rotary Citation/Club Excellence Award in preparation for completing Rotary Club Central information.

REFERENCE MATERIALS

Rotary Regional Roadmap for Zones 25B and 29
Action Plan Overview and Flyer
Strategic Planning Guide
Rotary Citation/Club Excellence Award
Rotary Club Central "How To" Documents

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

Breakout Discussion Questions

1. Where do you stand in setting your club's goals for the coming year?
2. What steps help create meaningful goals and effective action plans for your Rotary club?
3. What are the benefits of a three-year strategic plan?
Then point out the Strategic Planning Guide in the PETSWorkbook.
4. Describe how you would use the RI vision statement to formulate your own club action plan.
5. Describe how you would use the four priorities of the RI Action Plan to formulate your own club Action Plan.
6. Review the goals shown on the Rotary Citation/Club Excellence Award handout, and for each of the sections, identify strategies to complete these goals.
7. What are the benefits of sound financial and risk management procedures?
Identify three ways that you will ensure good stewardship of club funds; share your reasons with the group.
8. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
9. What is your **primary takeaway** from the Vibrant Rotary Club session?
10. Any other question(s)?

Rotary
Zones 25B & 29



REGIONAL ROTARY ROADMAP

Designed to provide Districts with ideas and motivation to increase activity and success!



2024-2025

DEAR DISTRICT GOVERNORS AND ROTARY LEADERS OF ZONES 25B AND 29,

This is a very exciting time to be leading Rotary International Districts and Clubs in 2024-2025 as we transition to setting goals and plans for three years. The multi-year approach will require District Governors and Leaders to use the Rotary Action Plan as their basis for the three-year plan.

The Roadmap is a valuable tool for District Governors and their teams to use in creating plans to achieve the goals. Not all goals can be accomplished in one year and that is why it is important to include the District Governor-Elect, District Governor-Nominee and current and future leaders.

The Rotary Zones 25B and 29 Coordinators have gathered some of the best practices from Districts and Clubs that lead to successful achievement of the goals in the following areas: Membership, Foundation, Public Image, Ending Polio, and Endowment/Major Gifts.

In order to encourage your participation, the Zone Leaders have created a Rotary Roadmap for each area that demonstrates adoption of the interventions. To support additional innovative strategies, you can also share your best practices in the Roadmap.

Your Zone Champion, Three Year Goal and Plan Leads, Zone Coordinators and their assistants will be working with you and your teams throughout the years on how you can best take advantage of the Roadmap best practices and strategies to achieve your goals.

We wish you the best as we work together to achieve goals that we know will be beneficial to all!

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Salvador Rizzo Tavares

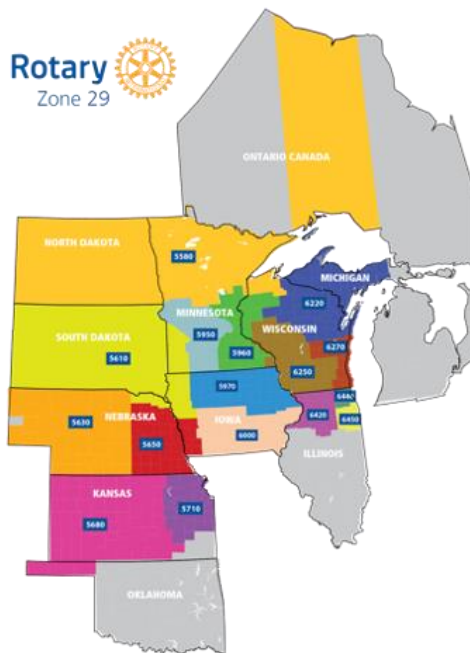
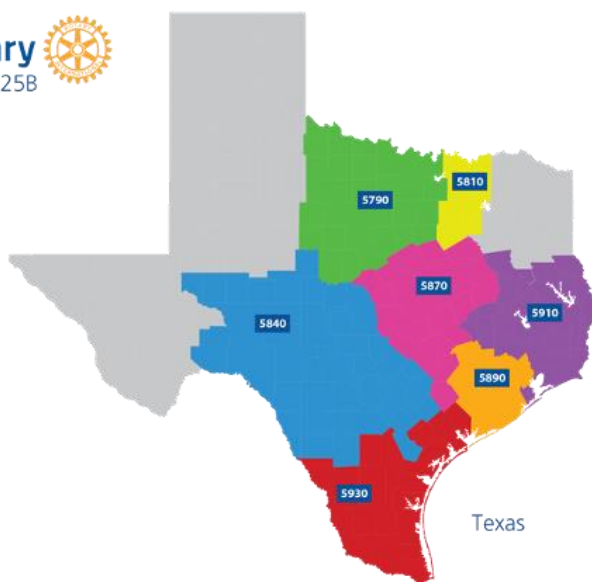
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Rotary's Vision

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



Rotary International and Rotary Foundation

2024-25 Annual Goals

IMPACT

As People of Action we make decisions grounded in evidence.

GOALS FOR PRIORITY 1 - INCREASE OUR IMPACT

- Eradicate polio and highlight Rotary's role.
- Increase the overall number of clubs and individual Rotary members giving to The Rotary Foundation whilst increasing contributions to the Annual Fund and PolioPlus and building the Endowment Fund to \$2.025 billion by 2025.
- Enable and measure effective club, district, and international programs and projects particularly in Rotary's Areas of Focus.

REACH

As People of Action we are inclusive, engaging, compassionate, and ambitious on behalf of the world.

GOALS FOR PRIORITY 2 - EXPAND OUR REACH

- Strengthen existing and develop new partnerships to elevate Rotary's global profile.
- Establish and nurture new, innovative clubs and participant engagement channels.
- Raise awareness and understanding of Rotary and Rotary members as People of Action.

ENGAGEMENT

As People of Action we create meaningful relationships across decades and continents.

GOALS FOR PRIORITY 3 - ENHANCE PARTICIPANT ENGAGEMENT

- Enhance member engagement tools that support Rotary's core values through personal growth, leadership development, service, and networking opportunities.
- Reduce the number of new members leaving within the first year of membership.
- Increase collaboration among participants particularly Rotary and Rotaract clubs.
- Further Rotary's commitment to Diversity, Equity, and Inclusion within our clubs, our leadership and throughout the Rotary family.

ADAPT

As People of Action we seek new perspectives and new ideas that can strengthen Rotary and create lasting change.

GOALS FOR PRIORITY 4 - INCREASE OUR ABILITY TO ADAPT

- Review Rotary's programs and offerings to ensure their relevance and effectiveness.
- Support and encourage the use of virtual connectivity to optimize in-person meetings, training, fundraising, and service projects.
- Continue to review our service delivery and volunteer leadership structure to improve effectiveness, responsibility, and accountability.

FOR MORE INFORMATION, GO TO www.zones25b-29.org

General Program OVERVIEW AND RULES

GOAL:

To provide actionable and measurable strategies that will help districts to focus on activities that will lead to increased and continued success.

RECOGNITION:

In each of the four areas (Membership, Polio Plus, Public Image and The Rotary Foundation), districts may submit the checklist, a two-page summary of activities, and one page of supporting documents for each area. If a district completes at least ONE activity in each category, they will be recognized with the "Regional Commendation" in that area. Additionally, if a district completes the required criteria in each of the four areas, they will be recognized as an "All Star District".

COMPETITION:

Along with the Commendation, districts will be judged on their summaries of activities, with a winning "District of the Year" chosen in each area.

DISTRICT OF THE YEAR:

Further, the standings in each area will be combined to determine an overall "District of the Year" in each zone, recognizing that district for outstanding performance through their actions in all areas.

SUPPORT:

Regional Leadership, including Regional Coordinators and their teams, will assist districts in several ways:

- Design Zone Institute track training that centers around the activities in the roadmap, which will lead to increased productivity and success in the districts.
- Provide ongoing data to districts so they can track their progress towards benchmarks during the Rotary year.
- Provide ongoing training opportunities throughout the year to assist districts in developing plans geared towards completing activities.
- Work with districts on an individual basis to assist as needed, and to provide proactive communication that will help identify any needs.

OVERALL BENEFITS:

The benefits of this Rotary Roadmap include:

- Providing direction to districts to help determine what to focus on in their planning activities (eliminating the practice of reinventing the wheel each year).
- Helping create good habits in districts that can be built upon to create sustainable success.
- Building teamwork within districts so more can be accomplished when people work together.
- Encouraging idea sharing between districts.
- Allowing for recognition of a job well done, which builds additional momentum for the future.
- Providing a historical record of what was accomplished each year.
- Creating friendly competition that will result in all districts doing more (and benefiting everyone).
- It's fun!

GENERAL RULES

- Districts will have the full 2024-25 Rotary year to complete the activities.
- All submissions should be received no later than August 1st, 2025, and should be completed using the defined submission process (combination of checklist & narrative).
- Submission process will be communicated to district leadership far in advance of August 1, 2025.
- Final determination on whether a submission in any area qualifies for credit will be made by the Regional Leadership Team.
- All recognition will be provided at the 2025 Zone Institute.

For more information, [CLICK HERE](#) or email RotaryRoadmap@gmail.com

ROTARY MEMBERSHIP ROADMAP

Activities for July 1, 2024 - June 30, 2025

Membership is the lifeblood of Rotary. The more members we have, especially engaged members, the more impact we can have on the world around us. Attracting new members, engaging, and retaining current members, and starting new clubs are all important in representing and serving the diverse communities we reside in. By implementing and achieving activities related to membership, your clubs will be strong, healthy, and vibrant!

CATEGORY 1: TEAM MAKE-UP

- ★ Have a District Membership Team made up of at least five members, with subcommittees including attraction, engagement, leads, new club development, and Rotaract, **Enhance Participant Engagement.**
- ★ Establish a Membership Team goal that helps your clubs achieve the 3-year membership goal for your district, **Increase Our Impact.**
- Include your Membership Team, resources, and engagement activities on the district website (TIP: post larger initiatives to Service Project Center and/or "Rotary Best Practices" or "Rotary Voices" to share with others!), **Expand Our Reach.**
- Develop a succession plan for Membership Team members to ensure continuity, **Increase Our Ability to Adapt.**
- Deliver District Membership Team presentations to clubs regarding important membership topics, **Increase Our Impact.**
- Other significant and innovative district team make-up related initiatives that are in the overall District Membership Plan.

CATEGORY 2: TRAINING/COMMUNICATION

- ★ Complete the District Membership Committee Intermediate learning plan in the Learning Center, **Increase Our Ability to Adapt.**
- ★ Ensure the Membership Team member attends the Membership training session at the 2024 Zone Institute in San Antonio, TX, September 4-8, **Increase Our Impact.**
- Assist clubs with adding their Club Membership Chair into MyRotary.org, **Expand Our Reach.**
- Conduct one or more District Membership Training Seminars or Workshops, **Enhance Participant Engagement.**
- Provide regular progress updates so club leaders know where they stand in relation to their membership goals, **Increase Our Impact.**
- Other significant and innovative training/communication related initiatives that are in the overall District Membership Plan.

CATEGORY 3: MEMBER ENGAGEMENT

- ★ Create a plan to retain at least eighty-five percent of existing members in your district, **Increase Our Ability to Adapt.**
- ★ Implement a Membership Olympics initiative to encourage clubs to proactively improve the retention of their members, **Expand Our Reach.**
- Identify and nurture negative growth clubs using resources available, **Increase Our Ability to Adapt.**
- Work with club leaders to motivate and inspire them to set attainable membership goals, **Increase Our Impact.**
- Work with Club Membership Chairs as they develop and implement activities that will have a direct impact on membership and struggling clubs, **Expand Our Reach.**
- Work with your Rotary and Rotaract clubs to implement assessments (surveys) of all club members to help clubs determine the needs of its members, **Enhance Participant Engagement.**
- Other significant and innovative membership engagement related initiatives that are in the overall District.



ROTARY MEMBERSHIP ROADMAP

Activities for July 1, 2024 - June 30, 2025

CATEGORY 4: MEMBER ATTRACTION

1. ★ Develop a specific District Membership plan with actionable steps that align with this Membership Roadmap, **Increase Our Impact.**
2. ★ Create a plan to help your clubs increase the number of new members by at least one percent, **Expand Our Reach.**
3. ★ Create a plan to increase the net number of Rotaract members by at least three percent, **Expand Our Reach.**
4. Encourage Rotary and Rotaract club presidents to sponsor a new member into their club, or another club, **Expand Our Reach.**
5. Design and distribute to Rotary and Rotaract clubs a new member orientation program that can be implemented for all new members, **Enhance Participant Engagement.**
6. Develop and implement a strategy to act on Rotary's Leads Program, **Increase Our Ability to Adapt.**
7. Other significant and innovative member attraction related initiatives that are in the overall District Membership Plan.

CATEGORY 5: NEW CLUB DEVELOPMENT

1. ★ Engage existing Rotary clubs to charter at least one Service Companion Club, **Expand Our Reach.**
2. Hold training sessions on innovative club formats, **Increase Our Ability to Adapt.**
3. Work with Zone Innovative Club Advocates and/or Assistant Rotary Coordinators to use the Grow Rotary Tool to identify locations that can support new clubs, **Expand Our Reach.**
4. Create a sustainable support plan for new Rotary and Rotaract clubs to help them thrive and retain members over the long term, **Enhance Participant Engagement.**
5. Showcase new innovative clubs and demonstrate how new Rotary and Rotaract clubs can make your district more vibrant, **Increase Our Impact.**
6. Include other innovative new club initiatives, or other activities that are in the overall District Membership Plan.

CATEGORY 6: DIVERSITY, EQUITY, AND INCLUSION

1. Develop a specific plan with actionable steps to promote diversity, equity, and inclusion in our Rotary and Rotaract clubs, **Enhance Participant Engagement.**
2. Help Rotary and Rotaract clubs create service projects that appeal to women, **Increase Our Impact.**
3. Help Rotary and Rotaract clubs create service projects that appeal to people under forty years of age, **Increase Our Impact.**
4. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct events that engage a diverse cross-section of members, **Expand Our Reach.**
5. Encourage clubs to make leadership roles more accessible and to invite more members into those roles, **Increase Our Ability to Adapt.**
6. Other significant and innovative DEI related initiatives that are in the overall District membership Plan.



ROTARY MEMBERSHIP ROADMAP

Activities for July 1, 2024 - June 30, 2025

CATEGORY 7: OTHER

1. Use ideas and tips from Zone leadership for successful activities, **Increase Our Ability to Adapt.**
2. Engage Rotary Alumni living in your district in Rotary and Rotaract club activities, **Enhance Participant Engagement.**
3. Work with district's Rotary Foundation and Public Image teams to share powerful stories of Rotary service, **Expand Our Reach.**
4. Work with the Public Image team to feature activities that engage Rotary and Rotaract club members throughout the district, **Increase Our Impact.**
5. Take part in implementing a "One Summit" or Vibrant Club Workshop training with district Public Image, Polio Plus and Rotary Foundation teams to show the importance of all areas working together and the synergy that comes from those efforts, **Enhance Participant Engagement.**
6. Other significant and innovative initiatives not included in other categories that are in the overall District Membership Plan.

**BELIEVE
THERE IS
GOOD IN
THE WORLD**

Ending Polio is Rotary's most significant priority and will fulfill a promise we made to the children of the world. While we have made great progress, we must keep going! As polio becomes less visible and our membership changes, we need to work hard to keep the importance of polio eradication in front of our members. Developing plans and taking action will help us reach our goal of a polio free world!

CATEGORY 1: TEAM MAKE-UP

- ★ Have a District Polio Plus Team that meets regularly made up of at least three members, **Enhance Participant Engagement.**
- ★ Establish Polio Plus Team goals that are clear and measurable, **Increase Our Impact.**
- Promote the district Polio Plus Team, resources, and activities on the district website, **Expand Our Reach.**
- Identify roles/responsibilities of team members, **Increase Our Ability to Adapt.**
- Develop a succession plan for Polio Plus Team members to ensure continuity, **Increase Our Impact.**
- Other significant and innovative Polio Plus team make-up related initiatives.

CATEGORY 2: TRAINING/COMMUNICATION

- ★ Assist clubs in identifying a Rotary Polio Plus team leader in their club, **Expand Our Reach.**
- ★ The Polio Plus Team leader, or a significant Team Member attends the Polio Plus training session at the 2024 Zone Institute in San Antonio, TX, September 4-8 or the 2024 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 2-4, **Increase Our Impact.**
- Conduct one or more District Polio Plus Seminars or Workshop, **Enhance Participant Engagement.**
- Encourage clubs to have a member review the resources on the EndPolioNow.org website, **Increase Our Ability to Adapt.**
- The Polio Plus Team leader, or a significant Team Member, participates in regional team calls/meetings on a regular basis, **Increase Our Impact.**
- Other significant and innovative training/communication related initiatives regarding polio eradication.

CATEGORY 3: POLIO PLUS GIVING

- ★ Develop a specific plan with actionable steps to increase Polio Plus giving in the district, **Increase Our Ability to Adapt.**
- ★ Increase the overall Polio Plus contributions by clubs/members, **Increase Our Impact.**
- ★ Increase the number of members who contribute to Polio Plus, **Enhance Participant Engagement.**
- Increase the number of clubs who contribute the requested amount of \$1,500 to Polio Plus, **Enhance Participant Engagement.**
- Work to encourage 100% of clubs to contribute to Polio Plus, **Expand Our Reach.**
- Work with DRFC to cultivate potential Major Donors to PolioPlus, **Expand Our Reach.**
- Increase the amount of District Designated Funds contributed to PolioPlus, with a goal of 20% annually, **Increase Our Impact.**
- Other significant and innovative Polio Plus giving related initiatives.



CATEGORY 4: PROMOTION

1. ★ Develop a specific plan with actionable steps to increase awareness of Polio Plus in the communities in your district, **Increase Our Ability to Adapt.**
2. ★ Hold at least one district-sponsored End Polio Now event in 2024-25, **Increase Our Impact.**
3. ★ Work with district Public Image team to develop articles/letters to the editor that can be published in at least four newspapers in conjunction with World Polio Day, which is October 23, **Expand Our Reach.**
4. Work with district Public Image team to promote World Polio Day and encourage clubs to submit an event to End Polio Now, **Enhance Participant Engagement.**
5. Work with district Public Image team to develop articles/letters to the editor that can be published in newspapers in conjunction with World Immunization Week, **Expand Our Reach.**
6. Other significant and innovative promotion related initiatives regarding polio eradication.

CATEGORY 5: CLUB COMMUNICATION

1. ★ Develop a specific plan with actionable steps to increase awareness of Polio Plus within district membership, **Increase Our Ability to Adapt.**
2. In conjunction with the Public Image and Rotary Foundation teams, help clubs in your district promote World Polio Day on social media, **Expand Our Reach.**
3. Help clubs promote and recognize World Immunization Week, which is typically the last week in April, **Increase Our Impact.**
4. Polio Plus Team members deliver presentations to clubs regarding the importance of Polio eradication and motivate them to donate, **Enhance Participant Engagement.**
5. Take part in implementing a "One Summit" training with district Public Image, Rotary Foundation, and Membership teams to show the importance of all areas working together and the synergy that comes from those efforts, **Enhance Participant Engagement.**
6. Other significant and innovative club communication related initiatives regarding polio eradication.

CATEGORY 6: OTHER

1. ★ Implement and promote a Polio Plus Society (members who make the commitment to give at least \$100 to Polio Plus every year) in the district and recognize those who join, **Enhance Participant Engagement.**
2. ★ Work with clubs in your district to set Polio Plus goals in Rotary Club Central, **Increase Our Impact.**
3. Encourage clubs to hold events that will help raise funds for, and increase awareness of, Rotary's Polio eradication efforts, **Expand Our Reach.**
4. Work with DRFC to provide regular progress updates so club leaders know where they stand in relation to their Polio Plus goals, **Increase Our Impact.**
5. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct polio related events that engage a diverse cross-section of members, **Increase Our Ability to Adapt.**
6. Other significant and innovative initiatives regarding polio eradication that didn't fit into any of the above categories.

While the impact we make on the world around us is significant we can't maximize our impact without telling people who we are and what we do. Creating a positive public image in our communities and within our clubs is essential to engage people so they feel an emotional connection to our efforts, and become more likely to give their time, energy, and money to Rotary. This public image doesn't happen by accident but through many activities we can build our image to increase our impact!

CATEGORY 1: TEAM MAKE-UP

1. ★ Have a District Public Image Team that meets regularly made up of at least four members, **Enhance Participant Engagement.**
2. ★ Establish Public Image Team goals that are clear and measurable, **Increase Our Impact.**
3. Promote the Public Image Team, resources, and activities on the district website, **Expand Our Reach.**
4. Identify roles/responsibilities of team members, **Increase Our Impact.**
5. Develop a succession plan for Public Image Team members to ensure continuity, **Increase Our Ability to Adapt.**
6. Other significant and innovative Public Image Team related initiatives.

CATEGORY 2: TRAINING/COMMUNICATION

1. ★ Work with clubs to have a Rotary Public Image team leader identified in My Rotary, **Expand Our Reach**
2. ★ Conduct one or more District Public Image Training Seminars or Workshop, and invite Regional Public Image Team to assist in implementation of event, **Enhance Participant Engagement..**
3. ★ The Public Image Team leader, or a significant Team Member attends the Public Image training session at the 2024 Zone Institute in San Antonio, TX, September 4-8 or the 2024 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 2-4, **Increase Our Impact.**
4. Encourage clubs to have a member complete a Public Image related course on Rotary's Learning Center, **Increase Our Ability to Adapt.**
5. Create a "Public Image Checklist" with Public Image related activities or objectives clubs can accomplish over the course of the Rotary year **Increase Our Impact.**
6. Other significant and innovative Public Image training related initiatives.

CATEGORY 3: BRAND CONSISTENCY

1. ★ Have brand compliant district website and social media sites, **Expand Our Reach.**
2. ★ Conduct training for clubs highlighting importance of proper branding, **Enhance Participant Engagement.**
3. ★ Conduct an audit of club websites and social media sites, **Increase Our Impact.**
4. Work with clubs to have websites and social media that adhere to brand standards, **Increase Our Ability to Adapt.**
5. Other significant and innovative brand consistency related initiatives.



CATEGORY 4: SOCIAL MEDIA

1. ★ Have at least two district social media accounts, **Expand Our Reach**.
2. ★ Use People of Action materials in social media posts, **Increase Our Impact**.
3. ★ Promote district or club programs/projects each month, **Increase Our Impact**.
4. Develop, promote, and use a district hashtag on social media, **Enhance Participant Engagement**.
5. Create and post videos promoting a club or district project/initiative, **Increase Our Ability to Adapt**.
6. Other significant and innovative social media related initiative.

CATEGORY 5: COMMUNICATION WITH CLUBS/MEMBERS/PUBLIC

1. ★ Identify and promote club events on district website and/or social media, **Increase Our Ability to Adapt**.
2. ★ Create a press release template and encourage clubs to submit a press release to local media, **Increase Our Impact**.
3. Promote Service Project Center so clubs enter a project on Showcase, **Enhance Participant Engagement**.
4. Promote club or district events in local traditional media, **Enhance Participant Engagement**.
5. Submit press releases for club or district activities/initiatives to media in your district, **Expand Our Reach**.
6. Other significant and innovative communication related initiatives.

CATEGORY 6: PARTNERSHIPS

1. ★ Partner with another district in a Public Image initiative, **Increase Our Impact**.
2. ★ Work with district's Rotary Foundation, Polio Plus and Membership teams to share powerful stories of Rotary service, **Increase Our Impact**.
3. Work with district Membership team to feature activities that engage members throughout the district, **Enhance Participant Engagement**.
4. Partner with another organization to leverage promotion of Rotary district and clubs, **Expand Our Reach**.
5. Take part in implementing a "One Summit" training with district Rotary Foundation, Polio Plus and Membership teams to show the importance of all areas working together and the synergy that comes from those efforts, **Increase Our Ability to Adapt**.
6. Other significant and innovative partnership related initiatives.



ROTARY PUBLIC IMAGE ROADMAP

Activities for July 1, 2024 - June 30, 2025

CATEGORY 7: OTHER

1. ★ Work with clubs in your district to set Rotary Public Image goals in Rotary Club Central, **Increase Our Impact.**
2. ★ District Public Image team members deliver presentations to clubs regarding the importance of telling our story and providing actionable steps to increase the club's profile in the community, **Enhance Participant Engagement.**
3. Promote World Polio Day and encourage clubs to submit an event to End Polio Now, **Enhance Participant Engagement.**
4. Work with district leaders to identify clubs that plan to conduct Rotary Days of Service and help them tell stories that comply with brand guidelines, **Expand Our Reach.**
5. Encourage clubs and district teams to tell stories of effective programs and projects, especially in mental health and Rotary's areas of focus, **Expand Our Reach.**
6. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct events that engage a diverse cross-section of members, **Increase Our Ability to Adapt.**
7. Other significant and innovative public image initiatives that didn't fit into any of the above categories.



The Rotary Foundation helps maximize the impact of our projects by leveraging the financial resources and expertise of our members throughout the world. The Rotary Foundation, we would be a network of clubs doing our own projects with our own money. We can dream bigger because of The Rotary Foundation, and our impact grows as a result, takes planning and implementation of activities to engage our members to utilize and give to The Rotary Foundation, but the sky is the limit on what we can achieve!

CATEGORY 1: TEAM MAKE-UP

- ★ Have a District Rotary Foundation Team that meets regularly made up of several members. Positions should be focused on the Annual Fund, Paul Harris Society, Endowment and Major Gifts, Grants, Polio Plus, Scholarships, and Peace Fellows. Ensure that all members are identified in MyRotary.org, **Enhance Participant Engagement**.
- ★ Establish Rotary Foundation Team goals that are clear and measurable, **Increase Our Impact**.
- ★ Work to make Foundation giving an integral part of your district's culture, **Expand Our Reach**.
- Develop a succession plan for Foundation Team members to ensure continuity, **Increase Our Ability to Adapt**.
- Other significant and innovative Foundation Team make-up related initiatives.

CATEGORY 2: TRAINING/COMMUNICATION

- ★ Encourage every club to have a Rotary Foundation team leader identified in My Rotary, **Expand Our Reach**.
- ★ The DRFC, or a significant Team Member, attends the Rotary Foundation training session at either the 2024 Zone Institute in San Antonio, TX, September 4-8 or the 2024 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 2-4, **Increase Our Impact**.
- Conduct one or more District Rotary Foundation Training Seminars or Workshops, **Enhance Participant Engagement**.
- Encourage clubs to have a member complete a Foundation related course on Rotary's Learning Center, **Increase Our Ability to Adapt**.
- Provide regular progress updates so club leaders know where they stand in relation to their giving goals, **Increase Our Impact**.
- Other significant and innovative Foundation training/communication related initiatives.

CATEGORY 3: ANNUAL FUND

- ★ Work with every club in your district to set an Annual Fund goal in Rotary Club Central, **Increase Our Impact**.
- ★ Develop a specific plan with actionable steps to increase Annual Fund giving in your clubs, **Increase Our Ability to Adapt**.
- ★ Increase the number of your clubs that contribute to the Annual Fund by eliminating zero-giving clubs, **Expand Our Reach**.
- ★ Increase the number of individual members (Rotary and Rotaract) who contribute to the Annual Fund by building 100% EREY and 100% Sustaining Member clubs, **Expand Our Reach**.
- Increase the district's overall per capita contribution to the Annual Fund, **Increase Our Impact**.
- Increase the number of members giving through Rotary Direct, **Enhance Participant Engagement**.



ROTARY FOUNDATION ROADMAP

Activities for July 1, 2024 - June 30, 2025

7. Increase the active number of Paul Harris Society members in the district. Active means fulfilling their \$1,000 commitment, **Enhance Participant Engagement.**
8. Other significant and innovative Annual Fund related initiatives.

CATEGORY 4: ENDOWMENT FUND

1. Lead by example, with the District Governor and DRFCC making donations to the Endowment Fund by December 31 of the Rotary year, and encouraging other District leaders to do the same, **Increase or Impact.**
2. Form a District Endowment team to conduct a legacy event such as a Million Dollar Dinner with the goal of raising at least \$1,000,000 for the Endowment Fund of the Rotary Foundation, **Increase or Impact.**
3. Identify 5 prospective donors of Major Gifts (single gifts of \$10,000 or more) and provide the list to the Regional Endowment/Major Gifts Advisor, **Enhance Participant Engagement.**
4. Increase the number of new Benefactors in the district, **Expand Our Reach.**
5. Increase the number of new Major Donors in the district, **Enhance Participant Engagement.**
6. Increase the number of Bequest Society members in the district, **Enhance Participant Engagement.**
7. Other significant and innovative Endowment Fund related initiatives.

CATEGORY 5: GRANTS

1. ★ Reduce the amount of "carryforward" DDF (District Designated Funds), **Increase Our Impact.**
2. ★ Work to make your grants high-quality and high impact. Build the practices, infrastructure, and capacity needed to define, measure, track, and analyze data from our service projects in a much more efficient way, **Increase Our Impact.**
3. ★ Conduct Grants training seminars that highlight best practices, lessons learned, and success stories, **Expand Our Reach.**
4. Ensure that all Global Grants have current reporting, **Enhance Participant Engagement.**
5. Encourage members to attend project fairs and district events to establish partnerships and learn from previous successful projects, **Enhance Participant Engagement.**
6. Encourage clubs to use resources such as the TRF Cadre of Technical Advisors, Rotary Action Groups, and District International Service Chairs in developing Global Grant applications, **Increase Our Ability to Adapt.**
7. Other significant and innovative grants related initiatives.

CATEGORY 6: PARTNERSHIPS

1. ★ Increase the number of your clubs that participate in grants that other clubs in your district sponsor, **Enhance Participant Engagement.**
2. ★ Partner with other districts to provide funding to grants sponsored by clubs in other districts, **Enhance Participant Engagement.**
3. ★ Establish relationships with non-Rotary organizations/businesses to act as funding partners ("cooperating partners") on Global Grants sponsored within your district, **Expand Our Reach.**
4. Work with district Public Image team to align promotional plans for maximum effectiveness, **Increase Our Impact.**



ROTARY FOUNDATION ROADMAP

Activities for July 1, 2024 - June 30, 2025

5. Take part in implementing a "One Summit" training with district Public Image, Polio Plus and Membership teams to show the importance of all areas working together and the synergy that comes from those efforts, **Increase Our Ability to Adapt.**
6. Other significant and innovative partnership related initiatives.

CATEGORY 7: OTHER

1. ★ Tell your story to raise awareness of Rotary Foundation programs and to engage more Rotarian Participation in those programs, **Expand Our Reach.**
2. ★ Utilize Rotary Alumni in a district-sponsored event, **Enhance Participant Engagement.**
3. Endorse a candidate for a Rotary Peace Fellowship, **Increase Our Impact.**
4. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct events that engage a diverse cross-section of members, **Increase Our Ability to Adapt.**
5. Work with your District End Polio Now Team to develop plans to promote the importance of ending polio, **Increase Our Ability to Adapt.**
6. Encourage districts to give DDF to the Disaster Response Fund and promote successful disaster response grants, **Increase Our Impact.**
7. Other significant and innovative Foundation initiatives that didn't fit into any of the above categories.



Your Legacy, ROTARY’S PROMISE

Gifts to the Rotary Foundation's Annual Fund help people live better lives today. Gifts to the Rotary Foundation's Endowment support the same life-changing programs forever.

Endowed gifts can support any of Rotary's causes such as one of the seven areas of focus, or the Rotary Peace Centers. The most popular category of support from endowed gifts is SHARE, where net earnings from your endowed gift are split between the World Fund and your District. Worldwide, Rotary Districts are already receiving Millions of Dollars in support of their grant activities from endowed funds.

As a District Governor or other District officer, you have an important role in helping donors understand the impact they have on Rotary's Promise of service to the World, now and for many years to come.

What Can I Do?

Here are a few examples of things you and your District can be doing to support Rotary's Endowment:

- Ask Clubs and Rotarians in your District to support the Endowment SHARE fund benefitting your District.
- Encourage clubs to pursue Rotary's Promise recognition in which every club member pledges to be a Rotary Benefactor (leave at least \$1,000 to the Rotary Endowment as part of their estate plan or give \$1,000 to the Endowment currently).
- Conduct a Million Dollar Dinner campaign (12-18-month campaign), or other legacy event or program, in which Donors throughout the District are encouraged to make current or future gifts in support of the Endowment and other Foundation funds, with the aim of raising at least a Million Dollars in gifts and commitments, celebrated at the end by a dinner or other event.

Our Regional Leadership Team wants to support your efforts as a District Leader to benefit your District and The Rotary Foundation. Here are some important resources to keep in mind:

Endowment/Major Gift Advisor for our Region:

Bill Harvey
Rotary Club of Omaha
paulharrisrocks@gmail.com

Rachel Greenhoe
Rachel.Greenhoe@rotary.org
Districts 5580, 5610, 5950, 5960, 5970,
6000, 6220, 6250, 6270, 6420, 6440, 6450

Shelley Hill
Shelley.Hill@rotary.org
Districts 5790, 5810, 5840, 5870, 5890,
5910, 5930

Eric Thompson
Eric.Thompson@rotary.org
Districts 5630, 5650, 5680, 5710



Zone 25b & 29 LEADERSHIP DIRECTORY

| | | |
|---|------------------------|--|
| Rotary International Director, 2022-24: | Pat Merryweather-Arges | dg6450pat@aol.com |
| Rotary International Director, 2024-26: | Salvador Rizzo | salvador@rizzo.com.mx |
| Rotary Foundation Trustee, 2022-24: | Greg Podd | greg@pfscpa.com |
| Rotary Foundation Trustee, 2024-26: | Jennifer Jones | jennifer.jones@rotary.org |
| Rotary Action Plan Champion | Andrea Krauss | andrea.krauss@johnofarmer.com |
| Three-Year Goal and Plan Leaders | Kyle Haugen | jkylehaugen@gmail.com |
| | Rich Kaye | richkaye@hotmail.com |

MEMBERSHIP

| | | |
|------------------------------|--------------|--|
| Regional Rotary Coordinator: | Alex Johnson | alex@laurexadvisors.com |
|------------------------------|--------------|--|

END POLIO NOW

| | | |
|------------------------------------|--------------------|--|
| 2022-25 Coordinator, Zone 29 East: | Angela Rester | pdgrestersamse@aol.com |
| 2024-27 Coordinator, Zone 29 West: | Laura Kann | lk1@comcast.net |
| 2024-27 Coordinator, Zone 25B: | Terry Ziegler | bigzlumber@aol.com |
| 2021-24 Coordinator, Zone 29 West: | Bob Taylor | botaylor2205@hotmail.com |
| 2021-24 Coordinator, Zone 25B: | Rhonda Walls-Kerby | rwalls@sawpllc.com |

PUBLIC IMAGE

| | | |
|----------------------|------------------|--|
| 2021-24 Coordinator: | Kyle Haugen | jkylehaugen@gmail.com |
| 2024-27 Coordinator: | Patrick Harrison | pharrisonrotary@gmail.com |

ROTARY FOUNDATION

| | | |
|--|---------------|--|
| 2021-24 Coordinator: | Rich Kaye | richkaye@hotmail.com |
| 2024-27 Coordinator: | Sharron Miles | smilesrotary5790@gmail.com |
| 2022-25 Endowment/Major Gifts Advisor: | Bill Harvey | paulharrisrocks@gmail.com |



TAKING ACTION FOR CHANGE

We are at a defining moment in Rotary's history. We're implementing our Action Plan, a strategic road map that will help us better connect with each other, grow as an organization, and more effectively share our stories of how we are making a difference in communities.

At every level of Rotary, we have embraced opportunities to work together to achieve our goals. Over the coming four issues, you'll hear from Rotary members around the world who will offer their inspiration, encouragement, and guidance as we carry out the four priorities of the Action Plan.



IMPACT

We want to put our resources behind programs that will have the greatest impact and that align with our areas of focus.

We're creating tools and guidelines for tracking and sharing our efforts. We're also developing an evaluation process that will help us make objective recommendations about what is working and what we should continue, start, or stop doing.

REACH

We're committed to exemplifying and embracing diversity, equity, and inclusion (DEI) in everything we do.

We're testing new products and alternative models that will allow more people to connect and take action with us in ways that work best for them.

ENGAGE

We're tearing down the walls between "us" and "them" and focusing on participants.

We're asking people how they want to participate, finding ways to meet them where they are, and making sure they know we value them.

ADAPT

We're streamlining operations so we can be more agile and responsive.

We're simplifying the way we do things and helping members manage change so that our clubs, districts, and zones can more effectively communicate and work together.

Learn what your club can do at rotary.org/actionplan.

The **ROTARY ACTION PLAN**



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. **The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.** To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the coming years.

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making



STRATEGIC PLANNING *Guide*

Using Rotary's Action Plan to improve the club experience and make meaningful, lasting change within your community



ROTARY'S VISION STATEMENT

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



THE FOUR PRIORITIES



INCREASE OUR IMPACT

Let's develop and implement the practices, capacity, and infrastructure we need to define, measure, track, and analyze data from our service projects in a more effective way.

In your club this might look like...

Develop service projects that reflect the needs of your community and are more effective.



EXPAND OUR REACH

Let's share our values with new audiences, create ways to bring people together to experience the power of Rotary, and show that we're inclusive, engaging, compassionate, and ambitious about making change.

In your club this might look like...

Work with groups, organizations, and community leaders that you haven't partnered with before.



ENHANCE PARTICIPANT ENGAGEMENT

Let's use every encounter as an opportunity to show people how getting involved with Rotary allows them to make a bigger difference in their communities and for causes they care about.

In your club this might look like...

Make all members feel like they have a role in the club and make sure that anyone who engages with your club feels empowered to share their ideas and get involved.



INCREASE OUR ABILITY TO ADAPT

Let's create a culture of research, innovation, and willingness to take risks so we can learn, evolve, and better serve our communities.

In your club this might look like...

Ask members what your club should continue, start, or even stop doing to ensure that the club reflects the needs of its members and potential members.

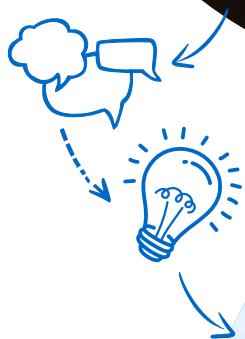


ABOUT THIS GUIDE

Just as a map guides people from where they are to their destination, a strategic plan that's based in action guides an organization to its goals and, ultimately, its strategic vision. Rotary's Action Plan, the long-term guide toward our vision of uniting people and taking action to create lasting change, was developed from what you and your fellow members want Rotary to be.

In the same way, strategic planning helps clubs move toward what members want from their Rotary experience. It acknowledges the challenges that clubs experience and addresses the underlying causes of those issues. It can also work as a guide to elevate participant experiences as well as their presence in communities. Our research has shown that clubs that develop and follow strategic plans are stronger than clubs that don't, with members who are more satisfied and who view their clubs and Rotary more positively overall.

This Strategic Planning Guide can help you set long-term priorities, using the framework of the Action Plan and time-based goals to support your club's strategic vision. This guide is designed for Rotary and Rotaract clubs, but districts may also find it useful.



STRATEGIC PLANNING PROCESS OVERVIEW

PHASE 1

Determine your status: How is your club doing now?

- Identify significant issues to address.
- Determine your club's strengths and weaknesses.
- Identify opportunities and challenges in the community.

PHASE 2

Develop a vision: What do you want your club to be like?

- List several characteristics that you want your club to have.
- Think about what you want your club to be known for.
- Write a vision statement.

PHASE 3

Make a plan: How can you achieve your vision?

- Identify the strategic priorities to focus on.
- Set your goals.
- List the action you'll take, your timeline, and the resources, such as financial support, that you'll need to succeed.

PHASE 4

Track your progress: How close are you to your goals?

- Monitor progress toward your goals.
- If you miss your targets, determine why.
- Adjust your strategic plans as needed.

GETTING STARTED

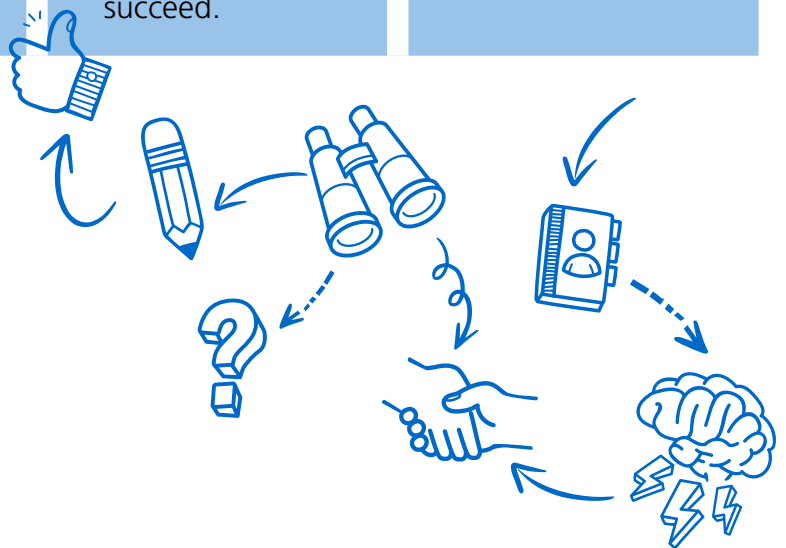
- Assemble a team made up of members with experience or an interest in strategy, as well as past, present, and incoming club leaders and committee members. This team will develop the strategic plan that reflects what members envision for the club's future.
- Choose someone to lead your strategic planning sessions. It could be a member who has experience in strategy, a club leader who is a skilled facilitator, or even an expert from the community.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision statement aligns with Rotary's strategic vision.
- Use the Action Plan as a framework to develop your club's strategic plan.

TIP

Asking community members to join in on your planning session is a great way to get diverse perspectives reflected in your plans.

FACILITATION GUIDE

Strategic planning is an opportunity to get members involved! Consider using the facilitation guide along with this worksheet to lead a strategic planning session. Include any member who expresses interest in participating. Remember, the more diverse perspectives you involve, the better your plan will reflect what members want. This helps create a shared vision that members will want to achieve together.



PHASE 1

DETERMINE YOUR STATUS: HOW IS YOUR CLUB DOING NOW?



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

- Identify any significant issues your club is experiencing
- Determine your club's strengths and weaknesses by gathering ideas from members and asking them what they're satisfied with and what they'd like to change
- Identify opportunities and challenges in the community by meeting with the leaders of other organizations or groups

IDENTIFY OPPORTUNITIES OR SIGNIFICANT CHALLENGES YOUR CLUB IS EXPERIENCING

What are the critical issues or concerns that your club wants to address with this strategic plan?

Ask members questions such as these to help you identify strategic issues:

- What do members and participants want that our club does not currently provide?
- What does our community need that our club could address through service projects?
- If our club is not attracting a diverse group of members and keeping them engaged, why is that?
- Who are the community members that our club should be including in our club activities and why?
- What are some processes and procedures your club can stop doing?
- What are some new and innovative ideas the club can test, and how?

TIP



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

STRATEGIC ISSUES

Reviewing the strategic issues you just identified, categorize them by the priorities they align with. This will help your club focus your strategic plan. It may be balanced across all four priorities, or your club may focus on one or a few priorities.

| IMPACT | REACH | ENGAGEMENT | ADAPTABILITY |
|--------|-------|------------|--------------|
| | | | |

DETERMINE YOUR CLUB’S STRENGTHS AND WEAKNESSES

List what your club does well and what it could improve on, based on what members said.

STRENGTHS

WEAKNESSES

TIP

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get insights from members to help determine your club’s strengths and weaknesses.

IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

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

OPPORTUNITIES

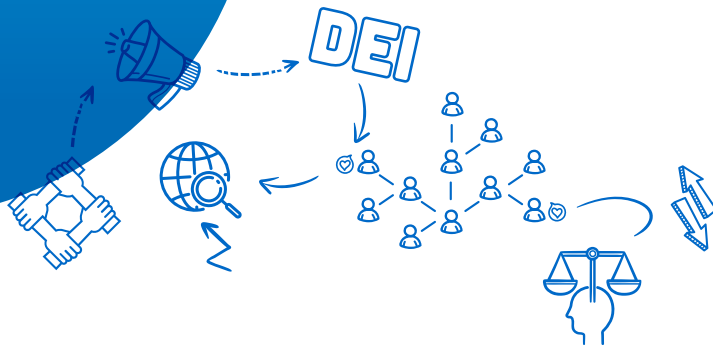
CHALLENGES

PHASE 2

DEVELOP A VISION: WHAT DO YOU WANT YOUR CLUB TO BE LIKE?

In determining what you want your club to be, work with the strategic planning team to:

- Identify characteristics that you want your club to have
- Think about what you want your club to be known for
- Create a vision statement



CLUB CHARACTERISTICS

Rotary's vision statement calls on us to "unite and take action to create lasting change." List five to seven characteristics you want your club to have within three to five years that will help realize that vision. Some examples might be service-oriented, fun, innovative, or representative of the community.

CHARACTERISTICS

| |
|--|
| |
|--|

WHAT DO YOU WANT YOUR CLUB TO BE KNOWN FOR?

Think about how you'd want someone to describe what your club does in the community. List what you'd like someone new in town to know that you do or what you want the legacy of your club to be.

Some examples might be that your club's tutoring program helps students go to college or that the club is part of a coalition that builds tiny homes for people who don't have permanent housing.

CLUB VISION STATEMENT

A vision statement defines your desired future and provides direction toward what you want your club to be. Referring to the list of club characteristics and what you want your club to be known for, write a one-sentence vision statement with your strategic planning team.

Consider these kinds of questions:

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

VISION STATEMENT

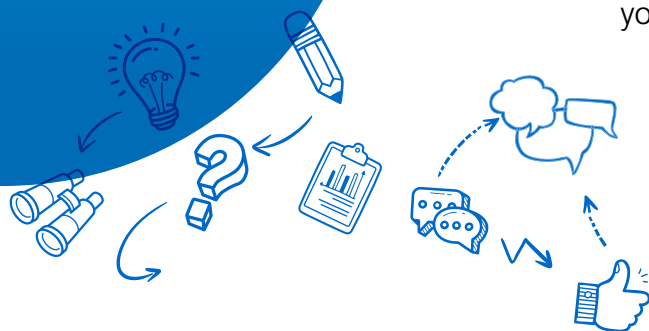
TIP



Your vision statement should resonate with club members. One example: "Our vision is to be recognized as meaningfully supporting youth in our community."

PHASE 3

MAKE A PLAN: HOW CAN YOU ACHIEVE YOUR VISION?



Now it's time to develop a plan to focus your club's strategic priorities and achieve your goals. To do this:

- Identify the strategic priorities your club is focusing on
- Set your goals
- List the actions you'll take, your timeline, and the resources, such as financial support, that you'll need to succeed

Goals are specific to the opportunities or significant challenges your club is working to address, and they should align with Rotary's strategic priorities. Working with your incoming leaders is also essential to ensuring the continuity of your multi-year goals.

In the chart below, list which priority (Impact, Reach, Engagement. Adapt) your goal is related to. Then list the goal, along with the action you'll take, the resources you'll need, and who will lead the effort to meet each goal. Set a timeline for each one. Strategic plans typically run on a 3-5 year cycle, please be sure to take club leadership changes into account.

When you set your goals, consider:

- Rotary's vision statement and the Action Plan
- Your club's strengths and weaknesses
- Your community's needs, opportunities, and challenges
- What your club's members and participants need and want
- What you can realistically achieve in three to five years



TIP

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

LIST THE SPECIFICS

| PRIORITY (IMPACT, REACH, ENGAGEMENT, OR ADAPTABILITY) | GOAL | ACTION TO TAKE | RESOURCES NEEDED AND TIMELINE | WHO LEADS THE EFFORT |
|--|------|----------------|----------------------------------|-------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

PHASE 4

TRACK YOUR PROGRESS: HOW CLOSE ARE YOU TO YOUR GOALS?



MONITOR YOUR PROGRESS

You'll need to track the progress toward your goals with the rest of the strategic planning team and suggest changes to the plan if needed. When new club leaders are named, discuss the strategic plan and your progress with them. Make sure they are familiar enough with the plan to suggest or understand if changes are necessary. If you're not making the progress you expected, you may want to try a new approach or allocate more resources toward your goals.

When you're monitoring your progress, consider using the questions in the table provided:

GOAL MONITORING PLAN

| | |
|--|--|
| HOW OFTEN SHOULD WE MEASURE PROGRESS TOWARD OUR GOALS? | |
| WHAT INDICATORS WILL WE MEASURE, AND WHAT IS OUR BASELINE? | |
| HOW SHOULD WE COMMUNICATE OUR PROGRESS TO CLUB MEMBERS? | |
| WHO SHOULD APPROVE CHANGES TO OUR PLANS OR GOALS? | |

REVIEW ANY GOALS YOU MISSED AND ADJUST THE PLAN

As you review the progress you’ve made, list your goals, including any goals that your club didn’t meet and why it didn’t. Determine what adjustments you need to make or what action to take.

When you’re identifying and listing your missed targets, ask:

- What goals did we meet?
- What goals didn’t we meet?
- What are the main reasons that we didn’t achieve some goals?
- What adjustments do we need to make to help us achieve those goals?

| GOAL | DID WE ACHIEVE IT? | WHAT WENT WELL? | WHAT CAN WE IMPROVE UPON? | WHAT CAN WE DO DIFFERENTLY NEXT TIME? |
|------|--------------------|-----------------|---------------------------|---------------------------------------|
| | | | | |
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| | | | | |

Congratulations on creating a strategic plan for your club! Remember that this is an ongoing process, and that you can always revisit your plan and make changes if the circumstances warrant it.

ROTARY CITATION / CLUB EXCELLENCE AWARD

GOALS AND INSTRUCTIONS

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

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

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

To achieve the Club Excellence Award:

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

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

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

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

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

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

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

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

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

ROTARY CITATION / CLUB EXCELLENCE AWARD

FREQUENTLY ASKED QUESTIONS

The questions in this document are organized into the following categories:

[Rotary and Rotaract Club Excellence Award](#)

[Access](#)

[Eligibility](#)

[Reporting goal achievement](#)

[Club Excellence goals](#)

[Recipients](#)

[Interact Club Excellence Award](#)

ROTARY AND ROTARACT CLUB EXCELLENCE AWARD

What is the difference between the Rotary Citation and the Club Excellence Award?

There is no difference as they are the same award. The Club Excellence Award is the new name for the Rotary Citation effective 1 July 2024. The award recognizes Rotary, Rotaract, and Interact clubs that successfully achieve goals that are aligned with Rotary's action plan. Established in 1992, the award has undergone some changes over the years to remain relevant and to continue to align with Rotary's strategic objectives. The RI Board approved the name change to better convey its intent as recognition of club excellence. This resource will refer to the award as the Club Excellence Award, although this name change does not become official until 1 July.

Why should clubs strive to earn the Club Excellence Award?

The Club Excellence Award is not just an honor for your club to receive, it is an important tool to help monitor the health and growth of your club. Taking action toward achieving the [club excellence goals](#) helps clubs engage their members, stay relevant in their communities, and run more efficiently. A welcoming and engaging club also reflects the values of Rotary. When clubs achieve their goals, they contribute to the overall health and culture of Rotary for generations to come.

How do I achieve the Club Excellence Award for Rotary ?

1. Go to [Rotary Club Central](#).

2. Review the available goals.
3. Select and set at least half of the goals available.
4. Achieve your goals.
5. Report your achievement in Rotary Club Central by 30 June. (Note: some achievements are recorded automatically, such as membership growth and TRF contributions.)
6. Pay each club invoice upon receipt (no later than within 60 days).

How do Rotaract clubs achieve the Rotaract Club Excellence Award?

Through the 2023-24 Rotary year, Rotaract clubs can complete the [Rotaract Citation Nomination form](#) to nominate their club for the Rotary Citation. Beginning in the 2024-25 Rotary year, the Rotaract club officers can log in to [Rotary Club Central](#) to review and select their goals. Just like Rotary clubs, Rotaract clubs need to achieve at least half of their goals to earn the Rotaract Club Excellence Award. They can return to edit these throughout the year and to report achievement. In addition, Rotaract clubs must pay their annual club invoices in full within 60 days to be eligible. Rotaract clubs that do not set goals and report achievement in Rotary Club Central or who do not pay their dues within 60 days beginning in the 2024-25 Rotary year will not be eligible for the Rotaract Club Excellence Award.

ACCESS

How do I access Rotary Club Central?

You can find [Rotary Club Central](#) directly on the homepage of My Rotary or by opening the "My Rotary" menu in the navigation. To learn how to use Rotary Club Central, you can take the online course in the Learning Center called [Rotary Club Central Resources](#). Learn more about [reporting goal achievements](#).

Who can see goals in Rotary Club Central?

All Rotarians and Rotaractors can see the goals in Rotary Club Central set by their club officers for any given year. If a member doesn't see a goal for the incoming year, it might be because one of these officers hasn't set it yet, or because the member hasn't been reported as a member of the club.

Who can set and manage goals in Rotary Club Central?

Any reported incoming or current officer at the club or district level, including assistant governors, can set goals for the upcoming year. Reported club officer positions include presidents, vice presidents, secretaries, treasurers, and club administration, membership, public image, service project, and Rotary Foundation committee chairs, learning facilitators, and the district executive secretary/director. If a club leader does not have the ability to set goals in Rotary Club Central, it might be that their [leadership role hasn't been reported](#) in My Rotary.

Can members who aren't club leaders enter a club's accomplishments?

By default, only club officers can set goals and mark achievement in Rotary Club Central. However, a club officer can [delegate online access](#) temporarily to a member to allow them to enter a club's accomplishment in Rotary Club Central. Note: Rotaractors are not yet able to delegate online access but will be able to in the future.

ELIGIBILITY

Do clubs have to be in good standing to earn the Club Excellence Award?

Yes. To be eligible for the Club Excellence Award, Rotary and Rotaract clubs need to begin the year as active clubs in good standing and remain so throughout the year. For the purposes of the Club Excellence Award, good standing means a club has paid each club invoice balance in full within 60 days after the club invoice is issued. If a club's payment isn't received by that date, it will receive a 60-day reminder letter from Rotary International's Accounts Receivable team, in which case the club will no longer be eligible. For Rotary clubs, dues are invoiced semiannually in July and January, while Rotaract clubs receive one invoice per year in January.

New clubs that are chartered during the current Rotary year, that are in good financial standing and have achieved at least half of the available goals before the end of the Rotary year, are also eligible.

How can I verify that a club is in good standing?

To see whether your club is in good standing, you will need to check whether the club balance has been paid in full within the 60-day time frame.

To check your daily club balance, go to **My Rotary>Click on Club Name>Finance>Club Invoice**. You should have an outstanding balance of \$0.00. Invoices are due when they are posted, in mid-January for Rotary and Rotaract clubs, and in mid-July for Rotary clubs only.

To check whether your club dues were received on time, check the Club Excellence Recipients Report. This report can be found on My Rotary. Sign into **My Rotary** and click on the **Membership and Foundation Reports**. In the **Awards** section, you'll see the Club Excellence Award. Clubs are in good standing as long as they haven't received a 60-day reminder to pay their dues.

If you have questions about the club invoice or where to send your payment, including whether your club has a zero balance or received a 60-day reminder letter, contact your [financial representative](#).

Is our club still eligible for the Club Excellence Award if we achieve different goals than the ones we set at the beginning of the year?

Yes. If club leaders find that a goal that is set at the beginning of the year is going to be unattainable, but another will be achievable, they can edit the goals selected at any time during the year. As long as more than half of the goals are reported as achieved by the end of the Rotary year, the club is eligible for the award.

Are clubs chartered during the current Rotary year eligible for this year's Club Excellence Award?

Yes. If a newly chartered club is in good financial standing and has achieved at least half of the available goals before the end of the Rotary year, it is eligible. If it was chartered after January, it will be considered "in good standing." If it is chartered before January, it is considered to be "in good standing" if it has satisfied the January invoice payment on time. To confirm eligibility, presidents of newly chartered clubs should write to riawards@rotary.org.

Are satellite clubs eligible for the Club Excellence Award?

No. Satellite club goals and achievements should be combined with their sponsor club's goals.

REPORTING GOAL ACHIEVEMENT

Where should I report my club's goal achievements?

Achievement of most goals are self-reported and can be reported in Rotary Club Central by marking them "Achieved." The achievements for data-driven goals like membership

numbers and Rotary Foundation giving are updated from our database, so you don't need to report achievement of those.

Why is my previous year's membership growth not showing? I didn't remove members until 1 July.

Members who are added on 1 July count toward the next year's membership growth. Members who are removed on 1 July count toward the previous year's loss since they aren't members at the start of the Rotary year. For example, members who are added on 1 July 2024 count toward the next year (2024-25)'s membership growth. Members who are removed on 1 July 2024 count toward the previous year (2023-24).

The membership trends graph in Rotary Club Central is updated based on 1 July membership figures so it won't update throughout the year. To find your club's current membership figures, sign into My Rotary and click on **Membership and Foundation Reports**.

How can I report achievement of our service project?

This is a system generated goal achievement, so members cannot report the achievement in Rotary Club Central. Instead, you must add completed projects in [Service Project Center](#). Once that is done, in roughly 24 hours, the achievement will update in Rotary Club Central.

How can I report an ongoing or completed service project?

If you have a multi-year project and are concerned about it impacting your achievement of the goal in Rotary Club Central, you can break your project into parts that will be achieved each year and mark each part complete when the Rotary year ends.

How can I see my club's progress?

Rotary and Rotaract members who have My Rotary accounts can see their club's accomplishments in the Club Excellence Recipients Report. You can find the report in Rotary Club Central in the reports tab. The report is also available in My Rotary. Go to My Rotary, then Membership and Foundation Reports. In the **Awards** section, you'll see Club Excellence. The report becomes available in October and remains active until 1 July.

I just achieved a goal for my club. Why isn't the achievement showing?

For most of the goals in Rotary Club Central, achievement is self-reported. You can enter the achievement at any time. It may take 24 hours to show as achieved on the report.

Achievement of a few goals are data-generated, such as membership numbers or Rotary Foundation giving, and the achievement may not appear in Rotary Club Central for 24 hours. Please check the Club Excellence Recipients report (see previous question) a day or two after reporting membership changes or submitting contributions.

Why isn't my Rotary club showing as having earned the Club Excellence Award on the Club Excellence Recipients report?

Sometimes clubs achieve their goals but forget to report their achievement in Rotary Club Central. Club excellence is awarded to clubs that achieve their goals and report their achievement. Clubs also must pay all club invoices within 60 days to be eligible. In addition, if your club received an exception for one of the requirements, it will not be reflected on the report.

CLUB EXCELLENCE GOALS

How do I find the Club Excellence Award goals in Rotary Club Central?

1. Go to Club Goals on the left side of the page if you are not there already.
2. Select the Rotary year (in the middle of the screen).
3. Select the **All** tab.

If goals have already been selected, all reported club officers can click on the edit button to change your club's selection.

Why are clubs asked to choose at least half of the goals to achieve the Club Excellence Award?

Allowing clubs to choose their goals provides flexibility and recognizes that some goals are more important or achievable than others, and this varies from club to club. Clubs must achieve at least half of the goals available to be eligible.

Where can I find a list of the Club Excellence Award goals that I can print?

You can find the goals for [Rotary](#), [Rotaract](#), and [Interact](#) clubs [on this web page](#).

Why are there new goals for Rotaract clubs?

After Rotaract was elevated to a club type, the Rotaract goals were updated to better align with Rotary's Action Plan. The new goals are designed to help Rotaract clubs to focus on increasing their impact, expanding their reach, enhancing participant engagement, and increase their ability to adapt.

How are new and existing members defined?

For the purposes of club excellence, new members are defined as those who were added on or after 1 July of the Rotary year in question. Existing members are those who were members prior to 1 July of the Rotary year in question.

Are there additional resources available to guide my club on updating our bylaws?

If it has been a few years since your club last updated your bylaws or you are unable to locate them, use the [Recommended Rotary Club Bylaws](#) as a starting point. Your club can tailor these bylaws, as long as your changes align with [Rotary's constitutional documents](#) and Rotary Code of Policies. Take the [Creating an Inclusive Club Culture](#) course in the Learning Center to see examples of how your club can ensure your bylaws reflect the needs of your members.

What does it mean to sponsor a new club member?

Sponsoring a club member means inviting someone to attend a meeting, service project, or other event, and helping them become a member of your club. A club sponsor can be reported to Rotary when [adding that member](#) to your club in My Rotary.

What are Rotary Action Groups and Rotary Fellowships?

[Rotary Action Groups](#) are independent, international, Rotary-affiliated groups whose members have expertise and experience in a particular area of specialization. Aligned with Rotary's priority to increase humanitarian impact, they use their knowledge and passion to help clubs and districts plan and carry out impactful humanitarian service projects.

- Membership is open to any individual. Rotarians, Rotaractors, and Peace Fellows can serve in leadership roles.
- By joining a Rotary Action Group, you can use your professional skills to advise on meaningful service activities outside your own club, district, or country.

- Rotary Action Groups provide networking opportunities with like-minded individuals from around the world.

[Rotary Fellowships](#) are international groups that share a common passion, vocation, or interest. Being part of a fellowship is a fun way to make meaningful connections and friends around the world, explore a hobby or profession, and enhance your Rotary experience.

How can I find out which members of my club are also members of a Rotary Action Group or a Rotary Fellowship?

RI currently does not track the membership information of Rotary Action Groups and Rotary Fellowships. Each action group and fellowship maintain their own membership data. You can find out about your club members' engagement with action groups/fellowships by surveying your club members.

What are examples of a leadership development program?

A leadership development program can be anything designed to give members opportunities for developing their leadership skills. Clubs can offer leadership development opportunities to their members, such as asking them to be on a committee or lead a club initiative. They can also support members interested in professional development by having a mentor program or giving them opportunities to develop new skills through new experiences, such as taking the professional development courses in [Rotary's Learning Center](#), and creating a supportive environment for them as they practice their skills in the club.

What learning events count for the learning event participation goal?

Any club leader who has attended a learning event to help them prepare for their role, virtually or in person, can be counted toward this goal.

What social activities count for the goal in Rotary Club Central?

Any social activity held outside of the regular club meeting that is open to all club members can count for this goal, including virtual events.

Can anyone host or sponsor youth exchange students?

No. Because there are RI policies and Rotary Youth Exchange certification standards that must be adhered to, participating clubs must operate under district supervision of the district Rotary Youth Exchange program.

What counts for RYLA participation?

This goal can include sponsoring or funding RYLA participants; planning, organizing or running the event; or participating in, facilitating, or speaking at the event.

RECIPIENTS

When is the Club Excellence Award processed?

Rotary and Rotaract clubs should report achievement of goals by 30 June, the last day of the Rotary year. On 1 July, the Club Excellence Recipients Report is downloaded to determine recipients as of 1 July. Certificates will be generated and sent in the first quarter of the new Rotary year. Requests for exceptions are considered on a case-by-case basis through the end of August and should come from the club's president for the previous Rotary year.

What does my club get for earning the Club Excellence Award?

If a club successfully completes all the goals necessary, they will receive a digital Club Excellence Award certificate signed by the RI President. Links to the certificates are distributed early in the following Rotary year to immediate past Rotary and Rotaract club presidents and immediate past district governors of those clubs who achieved the award.

How will certificates be distributed to clubs?

The RI Awards Team will email immediate past district governors of clubs who have earned the award. The email will include a link to a folder where certificates can be found. This allows district leaders to award their clubs with the certificate if they choose. A few weeks afterward, the link to the certificates will be emailed directly to immediate past club presidents. The certificates will be organized and sorted by district number and club name.

My club earned the Club Excellence Award, but we didn't get the certificate. Where can we find them?

If you believe you earned this award last Rotary year and did not receive your certificate, email RIawards@rotary.org. A link to the certificates for the 2023-2024 Rotary year will

be shared with the appropriate Rotary and Rotaract club and district leaders in the first quarter of the 2024-2025 Rotary year.

My club showed as having achieved the Club Excellence Award when I checked the report earlier in the Rotary year. Why didn't we receive the certificate?

The Club Excellence Recipients Report is dynamic and updates as membership or Foundation giving figures change. If it shows a club as having earned the award in May for example, but not in June, it may be that members were terminated at the end of the year which impacted their eligibility if that goal was selected. The report is pulled on 1 July to determine recipients as of that date. Goals achieved according to the report as of that date determine eligibility. Members terminated on 1 July will count as membership losses for the previous Rotary year. Members added on 1 July will count as membership gain for the current Rotary year. If goal achievements are updated after 30 June, they will not impact eligibility for the previous Rotary year.

INTERACT CLUB EXCELLENCE AWARD

How does the Club Excellence Award work for Interact clubs?

Interact clubs can be nominated online for the Club Excellence Award for Interact Clubs. Interact clubs can't be nominated by email, mail, or phone. The links to the nomination forms can be found on the [Club Excellence web page](#).

When does the nomination form for Interact Clubs open?

The nomination forms for Interact clubs opens in late August or September of the current Rotary year and are open until 15 August of the following Rotary year.

How do Interact clubs achieve the Club Excellence Award for Interact Clubs?

Interact clubs need to achieve more than half of their goals to earn the Interact Club Excellence Award. The club sponsor president or Interact club adviser has to submit the online nomination form indicating which goals have been met. You can find a [list of goals](#) and a link to the [nomination form](#) on the [Club Excellence web page](#). If at least half of the goals were met, the nominator receives a link to the certificate that can be downloaded, printed, and presented to the Interact club. Only Interact clubs that have an active charter with Rotary International are eligible.

Who can nominate an Interact club for the Club Excellence Award for Interact clubs?

Only sponsor club presidents and Interact club advisers may submit the nomination form for Interact clubs. If the Interact club is sponsored by more than one club, sponsor clubs should coordinate to submit the nomination.

Is there a list of Interact clubs who have achieved the Club Excellence Award?

Rotary International does not maintain or distribute a list.

What do I do if the Interact Club Excellence Award certificate doesn't arrive?

Upon submitting the nomination form for an Interact club, the nominator will receive an email that links to the certificate if the club qualifies. The nominator can then download the certificate and distribute it to the club. If the nominator doesn't have that email with the certificate link, it may be in their junk mail. If it's not there, they can email RIawards@rotary.org for help.

HOW TO ACCESS ROTARY CLUB CENTRAL



SIGN INTO YOUR MY ROTARY ACCOUNT

Rotary.org Brand Center English Sign In | Register

Rotary My Rotary Donate Get Involved

Welcome to My Rotary

Sign in or register to access your personalized My Rotary portal

Sign in or Register



Go to My Rotary and sign in.
Or choose **Register** to get a My Rotary account.

Easy access to resources


Rotary Club Central Grant Center Membership and Foundation Reports

You can also go to rotary.org/clubcentral to reach the site directly. You'll be prompted to sign in to My Rotary or create an account if you haven't already.

GO TO ROTARY CLUB CENTRAL

Rotary  My Rotary [Donate](#) [Refer](#) 


[My Rotary](#) [Participate](#) [Events & Connections](#) [Knowledge & Resources](#) [Who We Are](#)



Hello, Stacey [View Profile](#)

Evanston (Rotary Club)
Next Meeting
Thursday at 12:15
[View Club →](#)

District 6440
District
6440
Zone
29
[View District →](#)

[Donate](#) [Refer](#) 

[My Rotary](#) [Participate](#) [Events & Connections](#) [Knowledge & Resources](#) [Who We Are](#)


Resources & References

- Grants & Services
- Resources by Role
- Membership Materials
- Club and District Administration
- District Committees

Rotary Tools

- [Rotary Club Central](#)
- [Rotary Showcase](#)
- [Brand Center](#)
- [Raise for Rotary](#)
- [Learning Center](#)

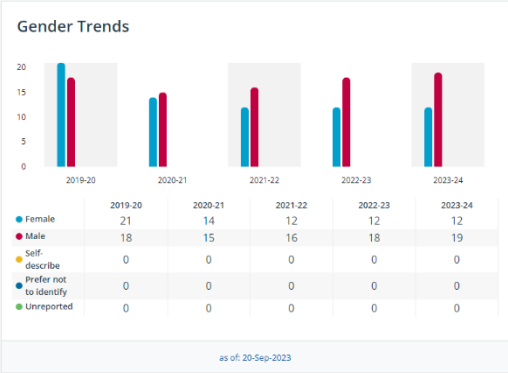
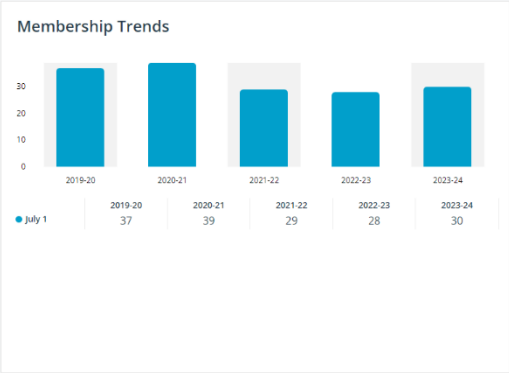
Webinars



Select **Rotary Club Central**

[View Knowledge & Resources Page >](#)

Rotary Club of **Chicago Lakeview**



HOW TO SET A GOAL

For club officers



FIND GOALS TO TRACK

Rotary Club Central

Club Goals

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

Rotary Club of **Anytown**
0 of 4 Achievement

< 2024-25 >

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

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

| | ACHIEVEMENT | GOAL |
|--|-------------|------|
| Service participation ★ Priority | 21 | 25 |
| Show goal details and history | | |
| Annual Fund contributions ★ Priority | | |
| Show goal details and history | | |
| PolioPlus Fund contributions ★ Priority | | |
| Show goal details and history | | |
| Club membership ★ Priority | | |

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

If the **Edit** button appears, select it to find goals your club wants to track. If this button reads **Save** and goals are displayed, proceed to the next step.

Rotary Club Central

Club Goals

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

Rotary Club of **Anytown**
0 of 4 Achievement

< 2024-25 >

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

Sort selected goals

| | ACHIEVEMENT | GOAL | SELECT GOAL |
|--|-------------|-------|-------------------------------------|
| Service participation ★ Priority | 21 | 25 | <input checked="" type="checkbox"/> |
| Show goal details and history | | | |
| Annual Fund contributions ★ Priority | 0 | 4,000 | <input checked="" type="checkbox"/> |
| Show goal details and history | | | |
| PolioPlus Fund contributions ★ Priority | 0 | 2,000 | <input checked="" type="checkbox"/> |
| Show goal details and history | | | |
| Benefactors ★ Priority | | | <input type="checkbox"/> |

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

October 2024

SET A GOAL

Rotary Club Central

My Rotary English

Club Goals

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

Rotary Club of **Anytown**
0 of 4 Achievement

< 2024-25 >

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

Which goals will your club track this year? Browse goals by category and select only those you plan to track. Save.

Sort selected goals

| | | | | |
|---------------------------------|-------------------|----|------------------|-------------------------------------|
| Service participation | ACHIEVEMENT | OR | GOAL | SELECT GOAL |
| > Show goal details and history | | | 25 | <input checked="" type="checkbox"/> |
| Annual Fund contributions | ACHIEVEMENT (USD) | OR | GOAL (USD) | SELECT GOAL |
| > Show goal details and history | 0 | | 4,000 | <input checked="" type="checkbox"/> |
| | As Of 18-Sep-24 | | Enter Goal Value | |
| PolioPlus Fund contributions | ACHIEVEMENT (USD) | OR | GOAL (USD) | SELECT GOAL |
| > Show goal details and history | 0 | | 2,000 | <input checked="" type="checkbox"/> |
| | As Of 18-Sep-24 | | Enter Goal Value | |
| Benefactors | ACHIEVEMENT | OR | GOAL | SELECT GOAL |
| ★ Priority | | | | |

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

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

HOW TO REPORT PROGRESS ON A GOAL

For club officers



FIND GOALS TO UPDATE

Rotary Club Central

Club Goals

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

Rotary Club of Anytown

0 of 4 Achievement

< 2024-25 >

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach

[EDIT](#) The goals you select will appear below. To report progress or add, remove, or edit a goal, select EDIT.

Service participation ★ Priority

> Show goal details and history

Annual Fund contributions ★ Priority

> Show goal details and history

PolioPlus Fund contributions ★ Priority

> Show goal details and history

Club membership ★ Priority

Before reporting progress on goals, make sure the **appropriate year** is listed

| ACHIEVEMENT | GOAL |
|-------------|------|
| 21 | 25 |

| ACHIEVEMENT (USD) | GOAL (USD) |
|-------------------|------------|
| 0 | 4,000 |
| As Of 18-Sep-24 | |

| ACHIEVEMENT (USD) | GOAL (USD) |
|-------------------|------------|
| 0 | 2,000 |
| As Of 18-Sep-24 | |

| ACHIEVEMENT | GOAL |
|-------------|------|
| 24 | 27 |

Select **Edit** to see a list of club goals

Rotary Club Central

Club Goals

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

Rotary Club of Anytown

0 of 4 Achievement

< 2024-25 >

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

[SAVE](#) [CANCEL](#) Which goals do you want your club to track this year? Browse goals by category and select only those you plan to pursue. Then save.

Sort selected goals

Service participation ★ Priority

> Show goal details and history

Annual Fund contributions ★ Priority

> Show goal details and history

PolioPlus Fund contributions ★ Priority

> Show goal details and history

Benefactors ★ Priority

Find the goals that you plan to update

| ACHIEVEMENT | GOAL | SELECT GOAL |
|-------------|------|-------------------------------------|
| 21 | 25 | <input checked="" type="checkbox"/> |

| ACHIEVEMENT (USD) | GOAL (USD) | SELECT GOAL |
|-------------------|------------------|-------------------------------------|
| 0 | 4,000 | <input checked="" type="checkbox"/> |
| As Of 18-Sep-24 | Enter Goal Value | |

| ACHIEVEMENT (USD) | GOAL (USD) | SELECT GOAL |
|-------------------|------------------|-------------------------------------|
| 0 | 2,000 | <input checked="" type="checkbox"/> |
| As Of 18-Sep-24 | Enter Goal Value | |

Tip: Select **Sort selected goals** to arrange your club's goals for easy updating

UPDATE A GOAL

The screenshot shows the 'Club Goals' interface for the 'Rotary Club of Anytown'. The page includes a sidebar with navigation links: Club Goals, Global Summary, Trends, Service Projects, Resources, Reports, and Contact Us. The main content area displays a list of goals with columns for Achievement, Goal, and Select Goal. A 'SAVE' button is highlighted with a callout box.

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

Rotary Club of **Anytown**
0 of 4 Achievement

< 2024-25 >

All Goals Enhance Participant Engagement • Increase our impact • Exp...

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

Sort selected goals

| Service participation | ACHIEVEMENT | or | GOAL | SELECT GOAL |
|---------------------------------|-------------|----|------|-------------------------------------|
| > Show goal details and history | 21 | | 25 | <input checked="" type="checkbox"/> |

| Annual Fund contributions | ACHIEVEMENT (USD) | or | GOAL (USD) | SELECT GOAL |
|---------------------------------|-------------------|----|------------------|-------------------------------------|
| > Show goal details and history | 0 | | 4,000 | <input checked="" type="checkbox"/> |
| | As Of 18-Sep-24 | | Enter Goal Value | |

| PolioPlus Fund contribu | ACHIEVEMENT (USD) | or | GOAL (USD) | SELECT GOAL |
|---------------------------------|-------------------|----|------------------|-------------------------------------|
| > Show goal details and history | 0 | | 2,000 | <input checked="" type="checkbox"/> |
| | As Of 18-Sep-24 | | Enter Goal Value | |

| Benefactors | ACHIEVEMENT | or | GOAL | SELECT GOAL |
|---------------------------------|-------------|----|------|--------------------------|
| > Show goal details and history | - | | - | <input type="checkbox"/> |
| | | | 275 | |

Enter your club's progress towards a chosen goal in the **Achievement** column

Select **Save** after you've reported progress on your club's goal

HOW TO VIEW INFORMATION



Members can view summary information two ways in Rotary Club Central: **Global Summary** and **Reports**

Global Summary

Rotary Club Central

My Rotary English

Club Goals

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

Rotary Club of Anytown
0 of 4 Achievement

< 2024-25 >

All Goals Enhance Participant Engagement In

[EDIT](#) The goals you select will appear

Service participation ★ Priority

[Show goal details and history](#)

Annual Fund contributions ★ Priority

[Show goal details and history](#)

ACHIEVEMENT 21 **OF** **GOAL** 25

ACHIEVEMENT (USD) 0 **OF** **GOAL (USD)** 4,000
As Of 18-Sep-24

ACHIEVEMENT (USD) **GOAL (USD)**

Global Summary

View the collective progress towards goals

Worldwide

< 2023-24 >

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

Enhance Participant Engagement | 2023-24
Current Membership: 1194108
as of: 08-Jan-2024

| GOAL | CLUBS WITH GOAL | 2023-24 ACHIEVEMENT | | 2023-24 GOAL |
|--|-----------------|---------------------|----|--------------|
| Service participation ⓘ | 4117 / 36876 | 2162 | of | 5106229 |
| Social activities ⓘ | 3521 / 36876 | 302 | of | 22546 |
| Rotary Action Group participation ⓘ | 2847 / 36876 | 133 | of | 8925 |
| Leadership development participation ⓘ | 3666 / 36876 | 308 | of | 17453 |
| District conference attendance ⓘ | 3987 / 36876 | 288 | of | 32189 |
| Rotary Fellowship participation ⓘ | 3023 / 36876 | 328 | of | 23549 |
| District training participation ⓘ | 3870 / 36876 | 962 | of | 21051 |
| GOAL | CLUBS WITH GOAL | 2023-24 ACHIEVEMENT | | |

Select **Global Summary**

Select the Rotary year

Select the organization level to view related summary data about progress towards goals. You can also view trends for each organization level on the Trends screen.

Global Summary
View the collective progress towards each goal worldwide and across your zone, district or club groups

District **0000**
< 2023-24

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

Enhance Participant Engagement | 2023-24
Current Memberships: 1523
as of: 08-Jan-2024

| GOAL | CLUBS WITH GOAL | 2023-24 ACHIEVEMENT | 2023-24 GOAL |
|--|-----------------|---------------------|--------------|
| Service participation ⓘ | 23 / 53 | 55 of | 453 |
| Social activities ⓘ | 17 / 53 | 4 of | 113 |
| Rotary Action Group participation ⓘ | 16 / 53 | 4 of | 32 |
| Leadership development participation ⓘ | 9 / 53 | 3 of | 71 |
| District conference attendance ⓘ | 5 / 53 | 5 of | 73 |
| Rotary Fellowship participation ⓘ | 53 | 2 of | 40 |
| District training participation ⓘ | 53 | 8 of | 100 |

Each of the goals in the category is displayed.

The **Clubs With Goal** column shows the number of clubs that have set a goal, and the number of clubs in the district.

The **Achievement** column shows the total reported progress against the goal.

This column shows the goal total for all clubs who have set a goal.

Select the information button ⓘ for a description on how the displayed data was calculated.

District
Club Group

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

Enhance Participant Engagement | 2023-24
Current Memberships: 1523
as of: 08-Jan-2024

How are these numbers calculated?
Clubs with Goal - Number of clubs that have set a service participation goal out of the total number of clubs for selected area.
Achievement Aggregation - Sum of club members reported by clubs as participating in service activities for selected area. Goal Aggregation - Sum of individual club goals for number of members participating in service activities for the selected area.

| GOAL | CLUBS WITH GOAL | 2023-24 ACHIEVEMENT | 2023-24 GOAL |
|--|-----------------|---------------------|--------------|
| Service participation ⓘ | 23 / 53 | 55 of | 453 |
| Social activities ⓘ | 17 / 53 | 4 of | 113 |
| Rotary Action Group participation ⓘ | 16 / 53 | 4 of | 32 |
| Leadership development participation ⓘ | 18 / 53 | 3 of | 71 |
| District conference attendance ⓘ | 21 / 53 | 5 of | 73 |
| Rotary Fellowship participation ⓘ | 18 / 53 | | |
| District training participation ⓘ | 20 / 53 | | |

Select **Print** for a copy of the goal summary information.

Reports

Rotary Club Central

English

Select **Reports**. Then select the report you'd like to view.

Reports These reports provide context for your club's performance, service, and Foundation giving.

Members & Engagement Rotary Foundation Giving Service

Club Reports

REPORT

- Club Growth
- Club Membership Profile
- Listing of Sponsored and Satellite clubs
- Member Viability and Growth
- Members in a Club
- Membership Termination Profile
- New Member Sponsor

District Reports

REPORT

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You can also find club and district reports by selecting the **Knowledge & Resources** tab then **Club & District Administration** on My Rotary

Web Intelligence

Club Type (Rotary or Rotaract) (All values) Club Subtype (All values)

Rotary CLUB GROWTH For Rotary (2023 - 2024)

Club Growth for District

| Club ID | Club Type | Club Name | 01-Jul-2023 | | 31-Jul-23 | | 31-Aug-23 | | 30-Sep-23 | | 31-Oct-23 | |
|---------------------------------|-----------|-----------|-------------|----------|-----------|----------|-----------|----------|-----------|----------|-----------|--|
| | | | # | % Growth | # | % Growth | # | % Growth | # | % Growth | | |
| Rotary Club | | | 30 | 3% | 31 | 3% | 32 | 7% | 32 | 7% | | |
| Total Member Count For District | | | 31 | 3% | 31 | 3% | 32 | 7% | 32 | 7% | | |

You can view the report on the page or print it. You can also export the report to PDF, Excel, or CSV format.

You can view some reports as a chart or table

Club Growth (Detail)
Data as on : 14 December 2023

Page 1 of 2

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Club Growth (Detail) Club Growth (Chart) Club Growth (District Chart)

Notes

This image shows a full page of blank handwriting practice paper. It features approximately 28 evenly spaced, horizontal blue lines running across the width of the page. The lines are thin and consistent in color, providing a guide for letter height and placement. There are no margins, text, or other markings on the paper.