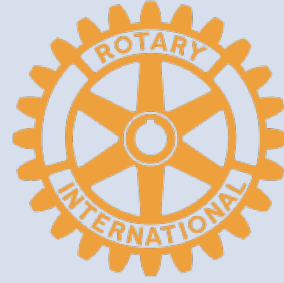


Rotary
Zones 25B & 29



REGIONAL ROTARY ROADMAP

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



**CREATE HOPE
in the WORLD**

2023-2024

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

We know how exciting the beginning of a Rotary year is as you anticipate and plan on how you and your team will meet your Rotary Goals. Every District Governor and their teams are committed to achieving their goals but sometimes are not sure of what strategies will work best to achieve those goals.

The Rotary Zones 25B and 29 Coordinators have gathered some of the best practices that lead to successful achievement of the goals in Membership, Foundation, Public Image, 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 Road Map.

Your Zone Coordinators and their assistants will be working with you and your teams throughout the year 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 all Create Hope in the World and work together to achieve goals that we know will be beneficial to all!

Pat Merryweather-Arges

Rotary International Director 2022-2024

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Greg Podd

The Rotary Foundation Trustee 2022-2026

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Rotary | 2023 – 2024 ANNUAL GOALS

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.

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

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

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

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

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 Citation" 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 Citation, 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 District Roadmap include:

- Providing a roadmap 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 2023-24 Rotary year to complete the activities
- All submissions should be received no later than August 1st, 2024, 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, 2024
- 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 2024 Zone Institute

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



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

1. Have a District Membership Team made up of at least five members, with subcommittees including attraction, engagement, leads, new club development, and Rotaract
2. Establish Membership Team goals that are clear and measurable and set in Rotary Club Central
3. Include your Membership Team, resources, and engagement activities on the district website (TIP: post larger initiatives to Rotary Showcase and/or "Rotary Best Practices" or "Rotary Voices" to share with others!)
4. Develop a succession plan for Membership Team members to ensure continuity
5. Deliver District Membership Team presentations to clubs regarding important membership topics
6. Other significant and innovative district team make-up related initiatives that are in the overall District Membership Plan

CATEGORY 2: TRAINING/COMMUNICATION

1. Assist clubs with adding their Club Membership Chair into MyRotary
2. Conduct one or more District Membership Training Seminars or Workshops
3. Encourage Rotary and Rotaract clubs to have a member complete at least one Membership related course on Rotary's Learning Center
4. Ensure the Membership team leader, or a significant Team Member attends the Membership training session at the 2023 Zone Institute in Evanston, IL, October 18-22 or the 2023 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 4-6
5. Provide regular progress updates so club leaders know where they stand in relation to their membership goals
6. Other significant and innovative training/communication related initiatives that are in the overall District Membership Plan

CATEGORY 3: MEMBER ENGAGEMENT

1. Identify and nurture negative growth clubs using resources available on MyRotary and Rotary Club Central
2. Work with club leaders to motivate and inspire them to aim high with their membership goals
3. Work with Club Membership Chairs as they develop and implement activities that will have a direct impact on membership and struggling clubs
4. Work with your Rotary and Rotaract clubs to implement assessments (surveys) of all club members to help clubs determine the needs of its members
5. Reduce the number of members leaving within their first year of membership by addressing club needs and culture
6. Create Rotary and Rotaract club member engagement activities that contribute to the comfort, care, and retention of volunteers
7. Other significant and innovative membership engagement related initiatives that are in the overall District Membership Plan



CATEGORY 4: MEMBER ATTRACTION

1. Develop a specific District Membership plan with actionable steps to increase Rotary and Rotaract membership
2. Encourage Rotary and Rotaract club presidents to sponsor a new member into their club, or another club
3. Design and distribute to Rotary and Rotaract clubs a new member orientation program that can be implemented for all new members
4. Develop and implement a strategy to act on Rotary's Leads Program
5. Welcome all new members to the district with communication from the District Membership Team
6. Create a plan to celebrate new members and sponsors within the district and with the general public
7. Other significant and innovative member attraction related initiatives that are in the overall District Membership Plan

CATEGORY 5: NEW CLUB DEVELOPMENT

1. Hold training sessions on innovative club formats and Rotaract clubs
2. 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
3. Create a sustainable support plan for new Rotary and Rotaract clubs to help them thrive and retain members over the long term
4. Engage existing Rotary and Rotaract club members to champion and mentor new clubs that are inclusive and welcoming
5. Showcase new innovative clubs and demonstrate how new Rotary and Rotaract clubs can make your district more vibrant
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
2. Help Rotary and Rotaract clubs create service projects that appeal to women
3. Help Rotary and Rotaract clubs create service projects that appeal to people under forty years of age
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
5. Encourage clubs to make leadership roles more accessible and to invite more members into those roles
6. Other significant and innovative DEI related initiatives that are in the overall District membership Plan

CATEGORY 7: OTHER

1. Use ideas and tips from Zone leadership for successful activities
2. Engage Rotary Alumni living in your district in Rotary and Rotaract club activities
3. Work with district's Rotary Foundation and Public Image teams to share powerful stories of Rotary service
4. Work with the Public Image team to feature activities that engage Rotary and Rotaract club members throughout the district
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
6. Other significant and innovative initiatives not included in other categories that are in the overall District Membership Plan



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

1. Have a District Polio Plus Team that meets regularly made up of at least three members
2. Establish Polio Plus Team goals that are clear and measurable
3. Promote the district Polio Plus Team, resources, and activities on the district website
4. Identify roles/responsibilities of team members
5. Develop a succession plan for Polio Plus Team members to ensure continuity
6. Other significant and innovative Polio Plus team make-up related initiatives

CATEGORY 2: TRAINING/COMMUNICATION

1. Assist clubs in identifying a Rotary Polio Plus team leader in their club
2. Conduct one or more District Polio Plus Seminars or Workshop
3. Encourage clubs to have a member review the resources on the EndPolioNow.org website
4. The Polio Plus Team leader, or a significant Team Member attends the Polio Plus training session at the 2023 Zone Institute in Evanston, IL, October 18-22, or the 2023 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 4-6
5. The Polio Plus Team leader, or a significant Team Member, participates in regional team calls/meetings on a regular basis
6. Other significant and innovative training/communication related initiatives regarding polio eradication

CATEGORY 3: POLIO PLUS GIVING

1. Develop a specific plan with actionable steps to increase Polio Plus giving in the district
2. Increase the overall Polio Plus contributions by clubs/members
3. Increase the number of members who contribute to Polio Plus
4. Increase the number of clubs who contribute the requested amount of \$1,500 to Polio Plus
5. Work to encourage 100% of clubs to contribute to Polio Plus
6. 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
2. Hold at least one district-sponsored End Polio Now event in 2023-24
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
4. Work with district Public Image team to promote World Polio Day and encourage clubs to submit an event to End Polio Now
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
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
2. In conjunction with the Public Image and Rotary Foundation teams, help clubs in your district promote World Polio Day on social media
3. Help clubs promote and recognize World Immunization Week, which is typically the last week in April
4. Polio Plus Team members deliver presentations to clubs regarding the importance of Polio eradication and motivate them to donate
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
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
2. Encourage clubs to hold events that will help raise funds for, and increase awareness of, Rotary's Polio eradication efforts
3. Work with clubs in your district to set Polio Plus goals in Rotary Club Central
4. Work with DRFC to provide regular progress updates so club leaders know where they stand in relation to their Polio Plus goals
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
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 several members
2. Establish Public Image Team goals that are clear and measurable
3. Promote the Public Image Team, resources, and activities on the district website
4. Identify roles/responsibilities of team members
5. Develop a succession plan for Public Image Team members to ensure continuity
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
2. Conduct one or more District Public Image Training Seminars or Workshop
3. Encourage clubs to have a member complete a Public Image related course on Rotary's Learning Center
4. The Public Image Team leader, or a significant Team Member attends the Public Image training session at the 2023 Zone Institute in Evanston, IL, October 18-22 or the 2023 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 4-6
5. Create a "New Year" (July 1-June 30) checklist with Public Image related activities or objectives clubs can accomplish
6. Other significant and innovative Public Image training related initiatives

CATEGORY 3: BRAND CONSISTENCY

1. Have brand compliant district website and social media sites
2. Conduct training for clubs highlighting importance of proper branding
3. Conduct an audit of club websites and social media sites
4. Work with clubs to have websites and social media that adhere to brand standards
5. Other significant and innovative brand consistency related initiatives

CATEGORY 4: SOCIAL MEDIA

1. Have at least two district social media accounts
2. Promote district or club programs/projects each month
3. Use People of Action materials in social media posts
4. Develop, promote, and use a district hashtag on social media
5. Create and post videos promoting a club or district project/initiative
6. Other significant and innovative social media related initiatives



CATEGORY 5: COMMUNICATION WITH CLUBS/MEMBERS/PUBLIC

1. Identify and promote club events on district website and/or social media
2. Promote Rotary Showcase so clubs enter a project on Showcase
3. Promote club or district events in local traditional media
4. Create a press release template and encourage clubs to submit a press release to local media
5. Submit press releases for club or district activities/initiatives to media in your district
6. Other significant and innovative communication related initiatives

CATEGORY 6: PARTNERSHIPS

1. Partner with another district in a Public Image initiative
2. Partner with another organization to leverage promotion of Rotary district and clubs
3. Work with district Membership team to feature activities that engage members throughout the district
4. Work with district's Rotary Foundation, Polio Plus and Membership teams to share powerful stories of Rotary service
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
6. Other significant and innovative partnership related initiatives

CATEGORY 7: OTHER

1. Work with clubs in your district to set Rotary Public Image goals in Rotary Club Central
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
3. 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.
4. Promote World Polio Day and encourage clubs to submit an event to End Polio Now
5. Encourage clubs and district teams to tell stories of effective programs and projects, especially in mental health and Rotary's areas of focus
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
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. Without 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. It 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

1. ★ 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.
2. ★ Establish Rotary Foundation Team goals that are clear and measurable
3. ★ Work to make Foundation giving an integral part of your district's culture
4. Develop a succession plan for Foundation Team members to ensure continuity
5. Other significant and innovative Foundation Team make-up related initiatives

CATEGORY 2: TRAINING/COMMUNICATION

1. ★ Encourage every club to have a Rotary Foundation team leader identified in My Rotary
2. ★ The DRFC, or a significant Team Member, attends the Rotary Foundation training session at either the 2023 Zone Institute in Evanston, IL, October 18-22, or the 2023 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 4-6
3. Conduct one or more District Rotary Foundation Training Seminars or Workshops
4. Encourage clubs to have a member complete a Foundation related course on Rotary's Learning Center
5. Provide regular progress updates so club leaders know where they stand in relation to their giving goals
6. Other significant and innovative Foundation training/communication related initiatives

CATEGORY 3: ANNUAL FUND

1. ★ Work with every club in your district to set an Annual Fund goal in Rotary Club Central
2. ★ Develop a specific plan with actionable steps to increase Annual Fund giving in your clubs
3. ★ Increase the number of your clubs that contribute to the Annual Fund by eliminating zero-giving clubs
4. ★ Increase the number of individual members (Rotary and Rotaract) who contribute to the Annual Fund by building 100% EREY and 100% Sustaining Member clubs
5. Increase the district's overall per capita contribution to the Annual Fund
6. Increase the number of members giving through Rotary Direct
7. Increase the active number of Paul Harris Society members in the district. Active means fulfilling their \$1,000 commitment.
8. Other significant and innovative Annual Fund related initiatives

CATEGORY 4: ENDOWMENT FUND

1. Develop a specific plan with actionable steps to increase the amount of giving to the Endowment Fund
2. 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
3. Increase the number of new Benefactors in the district



4. Increase the number of new Major Donors in the district
5. Increase the number of Bequest Society members in the district
6. Work with regional leaders and Rotary staff to conduct a Major Donor recognition or cultivation event
7. Other significant and innovative Endowment Fund related initiatives

CATEGORY 5: GRANTS

1. ★ Reduce the amount of "carryforward" DDF (District Designated Funds)
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
3. ★ Conduct Grants training seminars that highlight best practices, lessons learned, and success stories
4. Ensure that all Global Grants have current reporting
5. 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
6. 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
2. ★ Partner with other districts to provide funding to grants sponsored by clubs in other districts
3. ★ Establish relationships with non-Rotary organizations/businesses to act as funding partners ("cooperating partners") on Global Grants sponsored within your district
4. Work with district Public Image team to align promotional plans for maximum effectiveness
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
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
2. ★ Utilize Rotary Alumni in a district-sponsored event
3. Endorse a candidate for a Rotary Peace Fellowship
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
5. 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), in which Donors throughout the District are encouraged to make current or future gifts in support of the Endowment, 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:

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Major Gift Officers at Rotary International

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ZONE LEADERSHIP DIRECTORY

ZONES 25B & 29 LEADERSHIP DIRECTORY

Rotary International Director, 2022-24: Pat Merryweather-Arges dg6450pat@aol.com

Rotary Foundation Trustee, 2022-26: Greg Podd greg@pfscpa.com

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END POLIO NOW COORDINATORS

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PUBLIC IMAGE TEAM

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