

2025 Rotary Multi District Training Institute
District Learning Facilitators Agenda
Saturday, August 2, 2025

Coordinators: PDLF Arden Riley, D5840 and PADLF Monique Cabano, D5790

1.	9:30 - 9:40 a.m.	Welcome, Opening Remarks, Plan for the Day	PDLF Arden Riley
2.	9:40 - 10:00 a.m.	Ice Breaker: Your Learning Superpower Name, Club, District, Office Build rapport, reflect on strengths, and connect through shared purpose as a Learning Facilitator	PADLF Monique Cabano
3.	10:00 - 10:30 a.m.	Talk Learning Center To Me	Amy Hopkins RI Staff, Curriculum Development Supervisor
4.	10:30 - 11:00 a.m.	Building Your District Learning Plan	PDLF Arden
		1. Learning Framework	PADLF Monique
		2. Curriculum	PADLF Monique
		3. Calendar	PDLF Arden
		4. Required/Special/Supplemental Events	PDLF Arden
		5. Plan Elements and Design	PDLF Arden
5.	11:00 - 11:30 a.m.	Hands On Learning Plan Design – Small Groups	PADLF Monique
6.	11:30 a.m. - 1:00 p.m.	Lunch	All
7.	1:15 – 2:00 p.m.	Role of the Facilitator and Facilitation Techniques	Amy Hopkins RI Staff, Curriculum Development Supervisor
8.	2:00 - 2:45 p.m.	Table Talk: Introduction Making Your Learning Topics Come To Life	PADLF Monique
		1. Raising TRF Awareness Inspiring International Service	PDLF Arden
		2. Attracting and Engaging Members Enhancing Public Image	PDG Kelly Atkinson
		3. Advocating for Community Focusing on Vocational Service/Ethics	PDLF Arden

		4. Building Service to Youth Highlighting Rotary Basics	ADLF Monique
9.	2:45 - 3:00 p.m.	Break	All Participants
10.	3:00 - 3:15 p.m.	Idea Exchange from Table Talk Topics	All Participants
11.	3:15 - 3:45 p.m.	Designing Your Learning Facilitator Experience: Best Practices	All Participants
12.	3:45 - 4:00 p.m.	Evaluations and Adjournment	PDLF Arden



Monique Cabano
Past Assistant District Learning Facilitator
District 5790

Monique Cabano began her Rotary journey in 2012 with the Austin Cosmopolitan Rotary Club. During her time there, she held several board positions, led a transformative Global Grant project in Kenya, and served as Club President for the 2015–2016 Rotary year. Her commitment to service extended beyond the club level, having served as District 5870 Membership Chair and Assistant Rotary Coordinator for Membership in Zone 25B.

Following her marriage and relocation to North Texas, Monique became an active member of the Fort Worth South Rotary Club. She currently serves as President-Elect and Membership Chair for the 2025–2026 Rotary year. Additionally, she contributes to the District 5790 Membership Committee and served as a facilitator for the 2025 Lone Star PETS training. Her husband, Blake, is also a proud member of the Fort Worth South Rotary Club.

Professionally, Monique brings two decades of experience in account management and customer success within the technology sector. She currently serves as a Customer Success Manager at SentinelOne, where she partners with enterprise clients to drive adoption, retention, and long-term value.

Outside of her professional and Rotary commitments, Monique enjoys reading, attending live music events, running the occasional 5K, strength training, traveling, and spending quality time with Blake and their family. She also volunteers as an online mentor for university students in Kenya through the nonprofit Moja Tu.

Contact Info:

- Email: hodges.monique@gmail.com
- Call or Text: 512-657-6499



Arden Riley, District 5840 – Global Scholarship Committee, Co-Chair

Arden Riley joined the North Central Rotary Club of San Antonio in October 2014 and has since served in multiple leadership roles, including Membership Chair, Vice President, and Club President for the 2018–2019 Rotary year. Her passion for community service is especially evident in her dedication to hands-on service projects and efforts to combat food insecurity.

At the district level (Rotary District 5840), Arden has proudly served as Assistant Governor for three years, supporting between one to three clubs each year—an experience she considers the most rewarding role in Rotary. In 2021, she was appointed District Learning Facilitator, a position she continues to hold with enthusiasm. For the 2025–2026 Rotary year, she will serve as Co-Chair of the Global Scholarship Grant Committee.

Professionally, Arden recently retired after a remarkable 40-year career with DHL Express, one of the world’s leading logistics providers. Her tenure included a wide range of leadership positions across both operations and sales, such as Operations Supervisor, Operations Manager, District Operations Manager, Customer Program Manager, Manager of International Sales, Major Account Executive, and National Account Manager.

Arden has been married to her husband, Tom, for 44 years. They share a daughter and son-in-law and are the proud grandparents of two wonderful grandchildren. Arden and Tom enjoy golfing together and traveling whenever possible.

Contact Information:

Email: arden.riley@gmail.com

Call or Text: (210) 786-1226



Amy Hopkins
Curriculum Development Supervisor, Rotary International

A dedicated Rotarian and experienced educator, Amy thrives on facilitating engaging learning experiences. A second-generation Rotarian, she is a member of the Rotary Club of Chicago Lakeview and a Paul Harris Fellow +5. Amy's Rotary leadership experience spans from club president to district learning facilitator (District 6450) and institute co-education chair for Zones 25b & 29. With a background in elementary education, instructional coaching, and school leadership, Amy now channels her expertise into developing high-quality online courses and learning materials for Rotary International's Learning & Development team.

Contact Info:

- Email: Amy.Hopkins@rotary.org



Kelly C. Atkinson Past District Governor Rotary District 5420 Rotary Club of West Jordan, Utah

Kelly C. Atkinson is a native of Utah and has lived in the Salt Lake City Valley his entire life. In 1986, he became the first member of his party elected to the Utah House of Representatives from his area since the Great Depression. During his tenure in office, the Deseret News named Kelly as "one of the most effective legislators" on Capitol Hill for each term he served. That same year, Kelly helped form and became a charter member of a new Rotary Club in West Jordan, Utah. In the centennial year of Rotary, Kelly was the District Governor for District 5420. He was the chairman of the House of Friendship for the 2007 Rotary International Convention held in Salt Lake City. Kelly also served as Rotary Coordinator from 2016-2019. He and his wife Penny are both Arch Klumph Society Members as well as members of the Paul Harris Society. In 2010, Penny, Kelly's wife of 53 years, was elected as the first woman Governor in the history of District 5420. Kelly and Penny are among just a handful of Rotarian couples in the world that have both served as District Governors and the first and only couple to do so in Utah. Together, the Atkinsons have hosted 31 Exchange Students from all over the world. The Atkinson's have two sons, three grand-sons, and one great-granddaughter!



Francesco Arezzo

Rotary International President 2025-2026

Francesco Arezzo, a member of the Rotary Club of Ragusa, Italy, has been selected by the Board of Directors to become Rotary International's president for 2025-26. Arezzo will become president on 1 July.

The Board conducted a special session following the unexpected resignation of [RI President-elect Mário César Martins de Camargo on 8 June](#). Guided by the RI code and policies, the Board selected the new president-elect from a pool of candidates who were considered by the Nominating Committee for President of Rotary International in August 2023.

The 2025-26 presidential message, announced at the 2025 Rotary International Assembly in February, will remain [Unite for Good](#), which calls on Rotary members to be a force for unity in a world increasingly divided by politics, geography, and ideology. Through service projects, Rotary brings together people of every background — across races, religions, and professions — in a shared mission to do good in their communities.

Arezzo is an orthodontist in private practice. He is active internationally as a member of the Italian, European, and American orthodontics associations. He is vice president of the National Association of Italian Dentists for the province of Ragusa and was the founder and head for seven years of the delegation for Ragusa of the National Trust for Italy. He is a Knight of Honor and Devotion in Obedience within the Sovereign Order of Malta.

A Rotary member for more than 30 years, Arezzo has served as vice chair of the Joint Strategic Planning Committee and as RI director, learning facilitator, and as district conference presidential representative.

Arezzo is a Major Donor and Benefactor of The Rotary Foundation. He is married to Anna Maria Criscione, an entrepreneur in the tourism field. They have two children.



Salvador Rizzo Tavares
Rotary International Director 2024-2026

Salvador is the founder and CEO of the RIZZO Group, specializing in technological solutions for both private enterprises and governmental bodies.

A dedicated member of Rotary for 34 years with RC Monterrey Carlos Canseco, Salvador served as District Governor of D4130 during the 2009-2010 term. He has represented the President of Rotary International at District Conferences across Latin American countries on 13 occasions. Additionally, Salvador served as the Rotary Coordinator for Zone 21A from 2015 to 2018 and as a Training Leader at the RI International Assembly in 2020 and 2021.

He is recognized as a level 4 Major Donor of The Rotary Foundation. Personally, Salvador enjoys time with his three children—Anna María, Salvador, and Paulina—and takes delight in his three grandchildren—Enrique, Regina, and Santiago.

ROTARY LEARNING CENTER COURSES

Learn everywhere and anytime with Rotary's Learning Center. Take courses, find resources, connect with an online community, and track your progress. Sign in with your My Rotary account at rotary.org/learn, or find the link on My Rotary under the Knowledge & Resources tab. Courses are grouped by topic. You can filter by topic to find courses when you are in the Learning Center.

Courses marked with a ▲ symbol are available to non-members.

Courses marked with a ♣ symbol have discussion guides.

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Code	Language	Code	Language	Code	Language	Code	Language	Code	Language
EN	English	JA	日本語/Japanese	AR	Arabic	KN	Kannada	RU	Russian
DE	Deutsch/German	KO	한국어/Korean	BG	Bulgarian	LI	Lithuanian	SE	Serbian
ES	Español/Spanish	PT	Português/Portuguese	CZ	Czech	NL	Dutch	TA	Tamil
FR	Français/French	SV	Svenska/Swedish	HU	Hungarian	PL	Polish	TH	Thai
IT	Italiano/Italian	ZH	中文/Chinese	IS	Icelandic	RO	Romanian	UK	Ukrainian

ACCESSING THE LEARNING CENTER ON YOUR MOBILE DEVICE

The first time you visit the Learning Center, you need to access it from a desktop or laptop computer and accept the privacy policy. Then you can get the Rotary Learning Center app, RotaryLearn, and use the Learning Center on your mobile device.

SYSTEM REQUIREMENTS

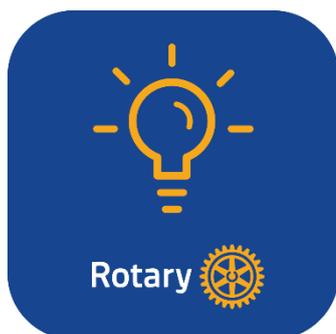
RotaryLearn, the Learning Center mobile app, is available for iOS or Android. It works best with iOS 13 or higher or Android 9 or higher, so find out what version you have.

For iOS (iPhone):

1. Open the **Settings** app.
2. Tap **General**.
3. Tap **About**.
4. Check **iOS Version**.

For Android:

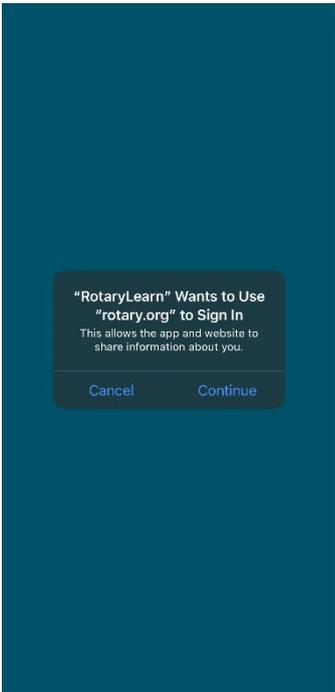
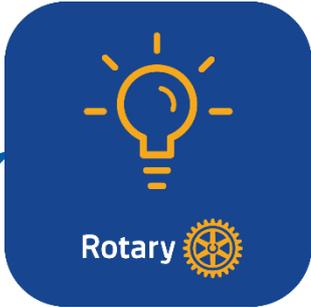
1. Open the **Settings** app.
2. Tap **About phone**.
3. For some phones, you'll need to tap **Software information**.
4. Check **Android version**.



Download the Rotary Learning Center app, RotaryLearn on your mobile device from Apple's App Store or from Google Play. Look for the blue background with the Rotary logo and a lightbulb.

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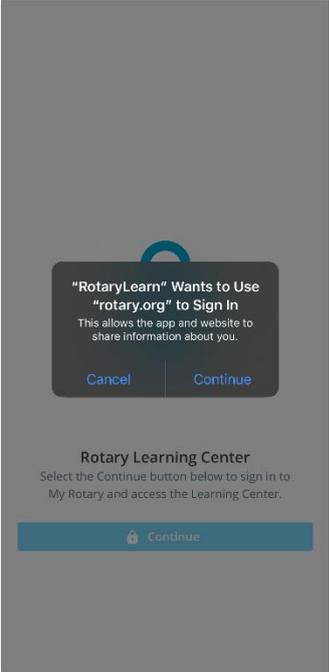
After downloading the app, return to your home screen, locate the icon, and open the app.



When the app opens, select **Continue**.

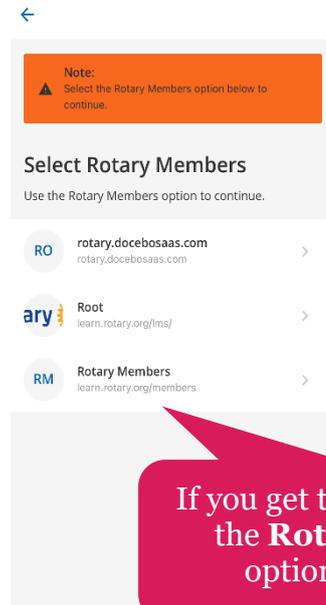
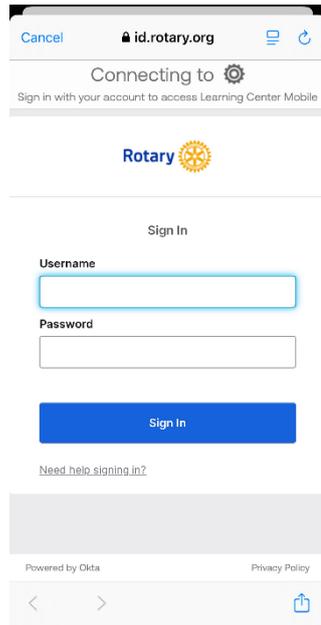
3

If you get stuck on this screen when you open the app, select **Continue** and try again.



4

On the next screen, enter your My Rotary username and password.



If you get this screen, choose the **Rotary Members** option to continue.

5

You can now use and explore the Learning Center on your mobile device.



How to close the RotaryLearn app

For iPhone X and newer models:

1. Swipe up to see the multitasking view.
2. Swipe up on the app to close.

Android

1. Open settings and choose **Apps**.
2. In the list of apps, scroll down to find **RotaryLearn**. Tap it.
3. Use the **Force stop** button. Confirm your choice when prompted.

Note that not every feature of the Learning Center is available in RotaryLearn, including some interactive learning options. You'll need to use a computer to download certificates or view additional resources.



ROTARY CLUB EXCELLENCE AWARD

GOALS AND INSTRUCTIONS

The Rotary Club Excellence Award 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?

Enhance Participant Engagement	
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.

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 work together to build a stronger world, **Rotary's Action Plan** — our strategic plan — is leading our organization to form more meaningful connections and make a more sustainable difference through service. Using the plan's four priorities as a guide, we're fulfilling the vision of Rotary International and The Rotary Foundation: creating healthy clubs, providing engaging experiences for all, and uniting people to take action with us to create lasting change.

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 ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill building

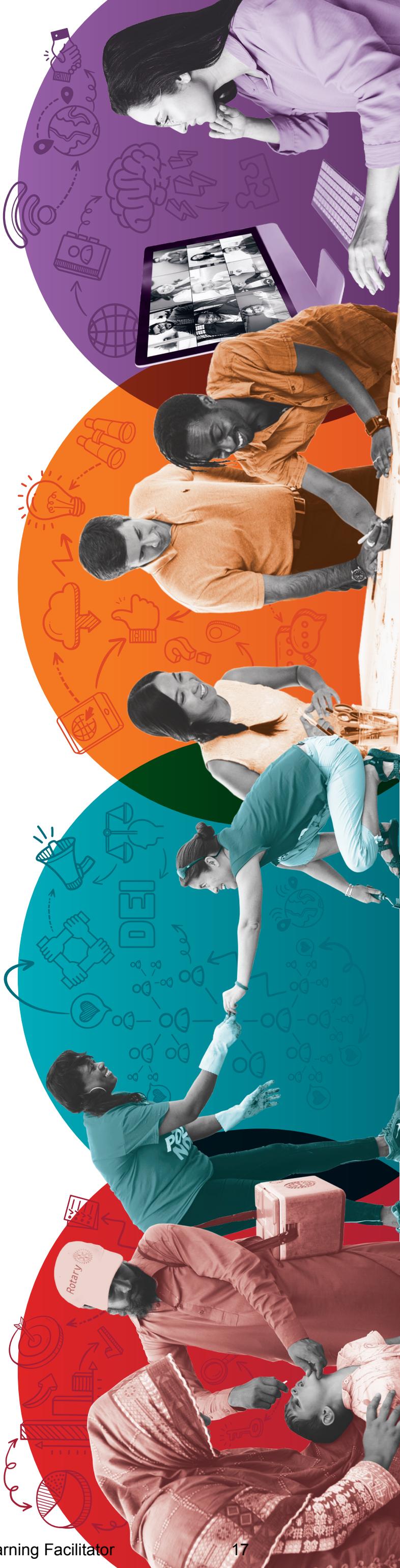
INCREASE OUR ABILITY TO ADAPT

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

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.



Rotary



ROTARY'S ACTION PLAN WHAT CLUBS CAN DO

Rotary's Action Plan builds on our past successes and sets our future direction to ensure that we continue to grow, unite people, and make a lasting impact.

We encourage all members to review the Action Plan, think about your own club and district goals, and find meaningful ways to align those goals with our plan. Have open and ongoing discussions in your club and throughout your district about the new priorities and objectives, then use those talks to shape your own strategies.

For each of the four priorities that will direct our work, we've listed ways you can put that goal into practice. Think about how you can bring Rotary's Action Plan to life.

ROTARY'S ACTION PLAN

INCREASE OUR IMPACT



DEVELOP A STRATEGY for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders.

CONDUCT A COMMUNITY ASSESSMENT to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

FOCUS YOUR EFFORTS. Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE LONG-TERM SUCCESSES of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

EXPAND OUR REACH



SET A GOAL to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

USE ROTARY'S MEMBERSHIP TOOLS and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS.** Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members.

BE SURE TO TELL COMPELLING STORIES about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract like-minded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.

ENHANCE PARTICIPANT ENGAGEMENT



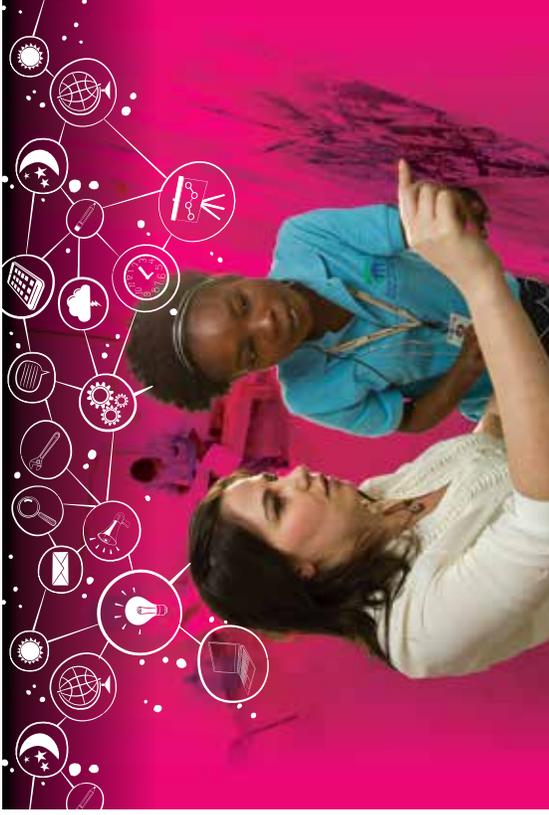
FOCUS NOT ONLY ON GAINING NEW MEMBERS BUT ALSO ON DELIVERING VALUE — both personal and professional — to current members. Hold a brainstorming session or use a survey to ask members what's important to them in their club experience and how they want to grow and develop through Rotary.

Consider everyone who encounters Rotary a participant. Invite them to **OFFER NEW IDEAS AND SHARE THEIR THOUGHTS**. Encourage them to stay involved (whether or not they join the club) so they feel valued and are inspired to support Rotary activities.

USE OUR CURRICULUM in the Learning Center, to develop leadership and other skills in members and participants.

EXPLORE ROTARY'S ACTION PLAN:
rotary.org/actionplan

INCREASE OUR ABILITY TO ADAPT



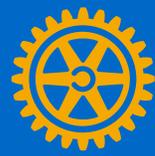
HOLD INNOVATION FORUMS AND BRAINSTORMING SESSIONS with club members and other participants to gather ideas for activities and service projects in the community. Contact other organizations or clubs that have a strong record of innovation or reinvention and look for ways to apply what they did to your own club.

SET ASIDE A SMALL FUND to try new ideas. Expand initiatives that succeed and document what you learn from those that don't.

REVIEW YOUR CLUB ROLES, PROCESSES, AND TASKS and look for ways to be more efficient — whether it's by reducing, combining, or eliminating responsibilities or using different technology.

ESTABLISH A CONTINUITY PLAN. Encourage club presidents, district governors, and other officers to work with the incoming leaders chosen for the next few years so that their efforts will be cohesive and all will be invested in a joint success.





Rotary

rotary.org/actionplan

The ROTARY ACTION PLAN

TALKING POINTS

We began an important new chapter in Rotary's history in 2018: We launched our Action Plan, a strategic guide to help us become more effective in everything we do and more effective in telling our stories.

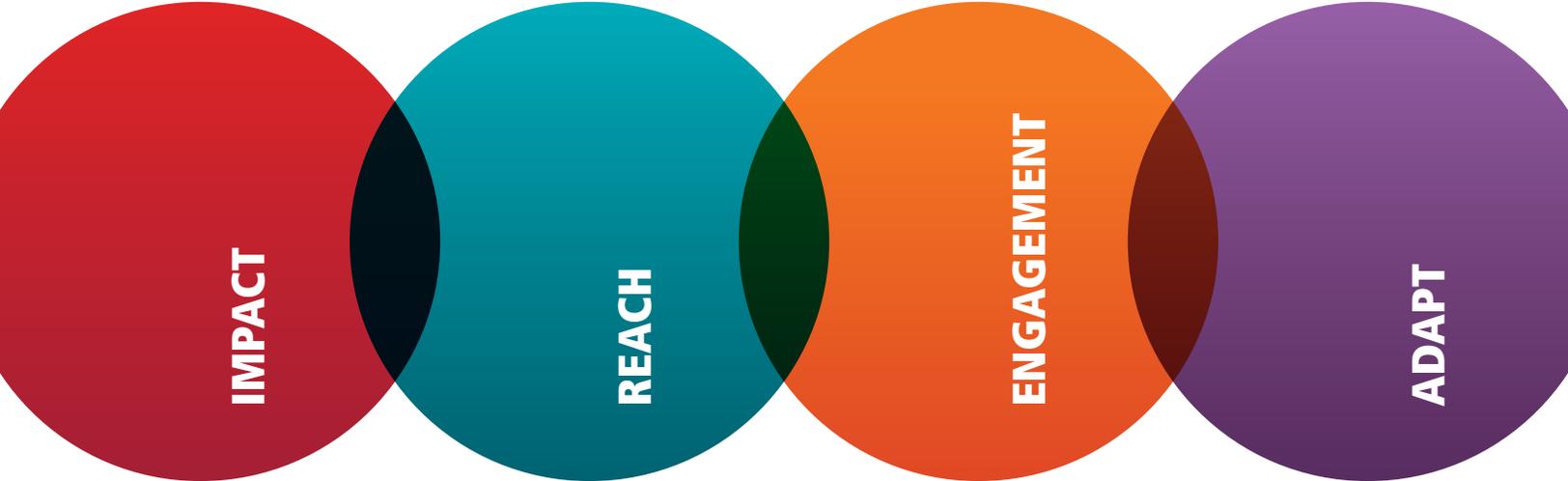
At every level of Rotary, people have embraced the opportunities the Action Plan offers us to meet new challenges and stay relevant for new generations.

I'm here today to give you a progress report on the Action Plan and the work that's underway for each of the plan's priorities:

- Increase our impact
- Expand our reach
- Enhance participant engagement
- Increase our ability to adapt

What I'm about to tell you shows that we don't have to do everything at once. We're setting achievable goals, monitoring our progress, and making adjustments as we go.

You'll find plenty of inspiration, encouragement, *and* direction to keep the Action Plan momentum going.



IMPACT

REACH

ENGAGEMENT

ADAPT

Progress report: **INCREASE OUR IMPACT**

Rotary staff and members at all levels are working together to develop practices and tools for measuring and sharing Rotary's positive, long-term change. And we're measuring our impact more deliberately because we know that current and potential partners, program participants, and, increasingly, donors want to see clear, tangible proof of our impact — especially for our humanitarian projects.

We want to ensure that we're using our resources for programs that have the potential for the greatest impact and that align with our Action Plan or organizational strategy. Every club and district, along with all of their members and participants, can significantly increase their impact by increasing their focus. We're developing an evaluation process that will help us make objective recommendations about what we should continue doing, start doing, or stop doing.

We're implementing Programs of Scale, a grant model that was developed to provide measurable and sustainable solutions to issues that affect many people in a large geographic area. Programs of Scale also provides us with a new framework for thinking about how we bring about change in the world.

TELL YOUR CLUBS: This work is underway. Encourage them to check the Action Plan page at rotary.org/actionplan for resources and news. But also remember that the best way to learn is by doing. Encourage clubs to identify a project they can use to explore and practice measurement.

TELL YOUR CLUBS: You'll support them in focusing their efforts by reviewing their activities and determining which ones can be streamlined or eliminated so the club can spend more time on making a bigger and more lasting impact. Connect them with other clubs that are also engaged in assessment to get a sense of collective effort.

TELL YOUR CLUBS: There's a Programs of Scale page at rotary.org/programsofscale that has resources that can help them find new ways to develop service projects. Encourage them to apply similar principles to their own projects and grants.

Progress report:
EXPAND OUR REACH

We're committed to embracing and exemplifying diversity, equity, and inclusion (DEI) in everything we do at Rotary. We have revised our DEI statement, which now reflects our stronger-than-ever commitment to being an organization that values, respects, and welcomes everyone who interacts with us. Now we're developing a comprehensive plan of action with achievable, measurable, and meaningful DEI outcomes for Rotary.

I strongly encourage you to read and follow Rotary's new DEI Code of Conduct, which points the way to creating more just, open, and welcoming communities for all people.

We're piloting and evaluating new products and participant models so that people can join us and take action, no matter where they live. We also see great potential in existing programs, including Rotary Action Groups, Rotary Community Corps, Rotary Fellowships, and others.

TELL YOUR CLUBS: They should visit our DEI page at rotary.org/dei to learn more about how to make their club more inclusive.

TELL YOUR CLUBS: We're eager to hear about the ways they're engaging people beyond traditional membership. Invite them to share those ideas through the My Rotary Action Plan page.

Progress report:

ENHANCE PARTICIPANT ENGAGEMENT

We're tearing down the walls between "us" and "them" and thinking about "participants" — a word that encompasses all Rotary members and others who get involved in Rotary activities, like family members, partners, and alumni. And we're making participants central to what we do, which means we're being proactive, asking people *how* they want to engage with us, and making sure they know that we value their participation.

We're looking at ways to measure member engagement and satisfaction so we can better understand what people are getting from Rotary. We know that when our members don't find their experiences to be personally or professionally relevant, they go elsewhere. The information we collect will assist clubs, districts, and Rotary International in determining how we can deliver greater value and give people more reasons to stay in Rotary.

TELL YOUR CLUBS: They should start surveying members to learn what's important to them in their club experience and how they want to grow and develop through Rotary. And make it clear that you're ready to listen: Be proactive in asking members if they feel engaged enough and listened to and if Rotary is meeting their expectations.

Progress report:

INCREASE OUR ABILITY TO ADAPT

We're improving our operations to become more agile and more responsive.

We're using change management strategies throughout Rotary, from the Secretariat to the club level. Governance models, committee structures, business processes — we're reviewing everything.

Having fewer administrative layers will address the disconnects between clubs, districts, zones, and headquarters. And it will give us a clearer picture of support and resources you need to stay ahead of change.

TELL YOUR CLUBS: Change is coming. We'll all be encouraged to do things differently. But new approaches to our organizing principles won't threaten our sense of who we are. Together, we can get Rotary ready for another century of service.

For more information contact
rotary@rotary.org or go to
the Rotary Action Plan page at
rotary.org/actionplan

HOW TO TALK ABOUT OUR ACTION PLAN

Like the People of Action who inspired it, Rotary's plan for the future is bold.

This glossary will help all of us at Rotary speak about our goals with one voice and one vocabulary so we can move forward and act as one.

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."

ACTION PLAN

The name for our five-year strategic plan, including four strategic priorities and 14 objectives.

PARTICIPANTS

All Rotary members and other individuals who engage in Rotary activities.

STRATEGIC PRIORITIES

INCREASE OUR IMPACT

Define, measure, track, and capture data from service projects to measure our impact, improve project quality, and create lasting change.

EXPAND OUR REACH

Develop new models of engagement to attract diverse Rotary participants and unite them in taking action.

ENHANCE PARTICIPANT ENGAGEMENT

Create new ways to inspire participants and provide valuable experiences that make them want to stay.

INCREASE OUR ABILITY TO ADAPT

Make Rotary's operating and governance structures more efficient, representative, flexible, and effective.

OBJECTIVES

The specific things we want the *Action Plan* to accomplish.

INITIATIVES

The actionable steps to achieve each objective. The Secretariat, with oversight from the Strategic Planning Committee, is responsible for accomplishing them.

INPUTS

The resources invested in a program.
Example: The materials used in a literacy program.

OUTPUTS

The immediate results of a program.
Example: The number of people who complete a literacy program.

OUTCOMES

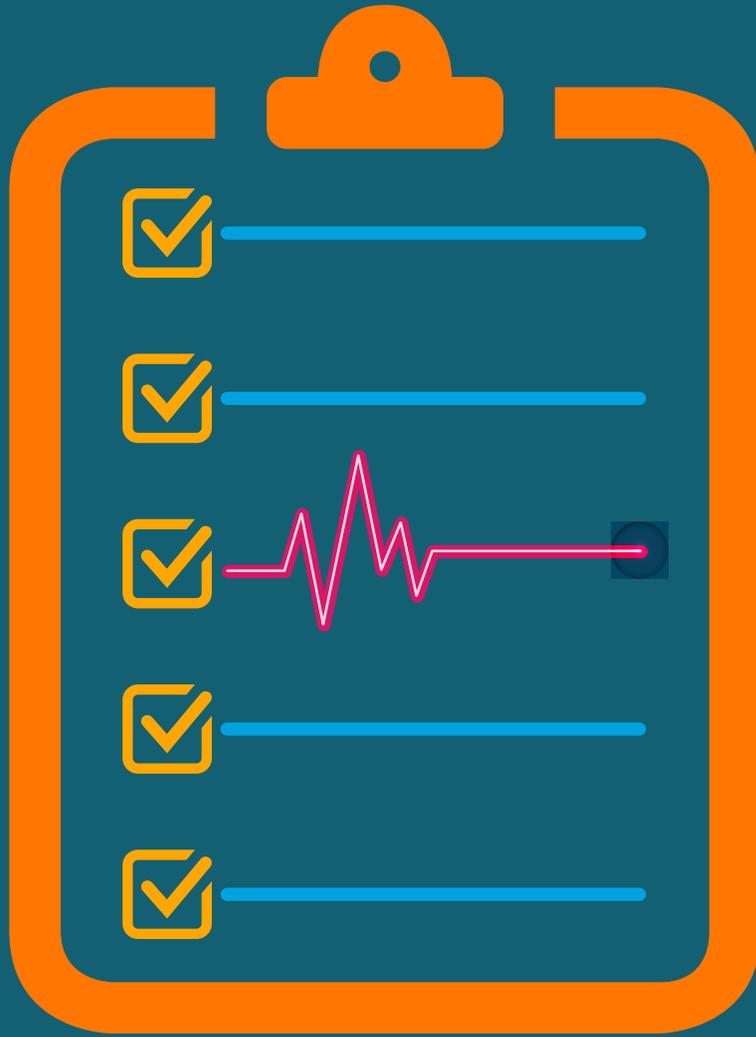
The short-term or intermediate results of a program.
Example: The number of people who gain reading proficiency in a literacy program.

IMPACT

The long-term effects or end results of a program.
Example: The changes in education outcomes for the community.

Be part of the plan:
myrotary.org/strategicplan





CLUB HEALTH CHECK

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

YOUR CLUB EXPERIENCE



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

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

COMMENTS

**SEE THE NEXT PAGE FOR YOUR
PROGNOSIS AND REMEDIES**





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

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li data-bbox="521 453 1455 520">+ Try something new at a meeting. For example, show one of these inspirational speeches and have a discussion afterward. <li data-bbox="521 543 1438 611">+ Hold online meetings when in-person meetings aren't feasible, or allow some members to connect virtually and others to attend in person. <li data-bbox="521 634 1333 701">+ Find a skilled person in the club or district who can facilitate and run online meetings. <li data-bbox="521 724 1357 791">+ Contact your Club and District Support representative or your regional membership officer for ideas.
Rotary experience beyond the club	<ul style="list-style-type: none"> <li data-bbox="521 867 1024 898">+ Sponsor another Rotaract or Rotary club. <li data-bbox="521 921 1057 953">+ Start or get involved in an Interact program. <li data-bbox="521 976 1393 1043">+ Connect members to Rotary's various programs. Sponsor an Interact club, organize a RYLA event, create a scholarship, or start an exchange. <li data-bbox="521 1066 1468 1098">+ Remind members that they can join a Rotary Fellowship or Rotary Action Group. <li data-bbox="521 1121 1442 1188">+ Promote district events that are open to all members. Have someone who has attended in the past talk about the experience. <li data-bbox="521 1211 1373 1278">+ Promote the work that Rotary and Rotaract do both globally and locally, including polio eradication. <li data-bbox="521 1302 1455 1369">+ Work with your local Toastmasters club to build leadership and communication skills among members. <li data-bbox="521 1392 1442 1459">+ Visit other clubs to connect with new people and see what they're doing that your club could try.
Unmet expectations	<ul style="list-style-type: none"> <li data-bbox="521 1545 1438 1612">+ Find out what experience your members want to get out of your meetings by using the Member Satisfaction Survey, and then give them that experience. <li data-bbox="521 1635 1382 1703">+ Encourage members to develop leadership skills by taking online courses developed by Toastmasters International.

SERVICE AND SOCIALS



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

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

COMMENTS



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

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> <li data-bbox="597 527 1425 625">+ Sponsor an Interact club, organize a RYLA event, create a scholarship, start an exchange, join a Rotary Action Group, or support the Rotary Peace Centers. <li data-bbox="597 653 1258 684">+ Let members know about Rotary's exchange programs.
Quality of projects	<ul style="list-style-type: none"> <li data-bbox="597 753 1390 821">+ Use Community Assessment Tools and A Guide to Global Grants to improve the quality of your projects. <li data-bbox="597 848 1425 879">+ Connect with your Cadre advisers to get guidance on service projects. <li data-bbox="597 907 1417 974">+ Evaluate your club's service projects to determine if repeating them is worth the effort.
Social activities	<ul style="list-style-type: none"> <li data-bbox="597 1039 1471 1071">+ Put one or two members in charge of organizing socials throughout the year. <li data-bbox="597 1098 914 1129">+ Join a Rotary Fellowship. <li data-bbox="597 1157 1365 1188">+ Find or create a variety of events with different times or formats.
Leadership	<ul style="list-style-type: none"> <li data-bbox="597 1255 1455 1323">+ Help your members develop and practice their leadership skills. Promote the Learning Center's professional development catalog. <li data-bbox="597 1350 1174 1381">+ Give new and young members leadership roles.

MEMBERS



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

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

COMMENTS



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

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> ⊕ Attract a wide array of members by using Diversifying Your Club: A Member Diversity Assessment. ⊕ Learn about Rotary's Commitment to Diversity, Equity, and Inclusion and related efforts.
Professional diversity	<ul style="list-style-type: none"> ⊕ Expand the skill sets of your members by recommending professional development courses.
Stagnant or declining membership	<ul style="list-style-type: none"> ⊕ Create a membership development plan. ⊕ Learn how to connect to prospective members and manage your membership leads in one place. ⊕ Target prospective members using this exercise. ⊕ Teach members your club's process for proposing new members and explain that they can also refer qualified prospects to other clubs. ⊕ Make sure that members are aware of all the ways they can be involved with Rotary besides through attending club meetings.
Members leaving	<ul style="list-style-type: none"> ⊕ Start with the Enhancing the Club Experience: A Member Satisfaction Survey to improve current members' experience. ⊕ Learn and act on trends using the Improving Your Member Retention: A Retention Assessment and Analysis. ⊕ Use the exit survey in Understanding Why Members Leave to consider the reasons your club can address. ⊕ Let resigning members know they can rejoin or change clubs when they are ready and stay in touch in the meantime. ⊕ Encourage Rotaractors to consider dual membership.
Orientation and Rotary knowledge	<ul style="list-style-type: none"> ⊕ Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center.

IMAGE



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

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

COMMENTS



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

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> ⊕ Find resources in Rotary's Press Center and use them in your community's media. ⊕ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's Brand Center.
Outdated materials	<ul style="list-style-type: none"> ⊕ Find editable club brochures and membership materials in Rotary's Brand Center. ⊕ Follow the Visual and Voice Guidelines in any materials your club creates. ⊕ Use Rotary videos and images of your members in your materials.
Online presence	<ul style="list-style-type: none"> ⊕ Find a member with the skills and time to create and manage your club website and social media pages. ⊕ Take the course The Rotary Brand in the Learning Center. ⊕ Use Rotary videos and images and videos of your own members. ⊕ Use Rotary's Social Media Toolkit to update your digital presence.
Marketing expertise	<ul style="list-style-type: none"> ⊕ Find tips in Club Public Image Committee Basics and put members with public relations expertise on the committee. ⊕ Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. ⊕ Refresh your club's social media presence using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



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

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

COMMENTS



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

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

WHAT'S NEXT?



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

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

NEXT STEPS

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

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

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

Action	Time frame	Person responsible

FEATURED RESOURCES

[Club Planning Assistant](#)

[Membership Assessment Tools](#)

[Membership resources](#)

[Brand Center](#)

[Learning Center](#)





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.

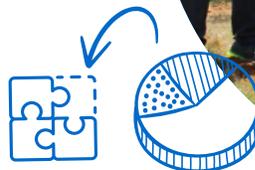


ABOUT THIS GUIDE

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?	PHASE 2 Develop a vision: What do you want your club to be like?	PHASE 3 Make a plan: How can you achieve your vision?	PHASE 4 Track your progress: How close are you to your goals?
<ul style="list-style-type: none"> → Identify significant issues to address. → Determine your club's strengths and weaknesses. → Identify opportunities and challenges in the community. 	<ul style="list-style-type: none"> → 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. 	<ul style="list-style-type: none"> → 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. 	<ul style="list-style-type: none"> → 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 

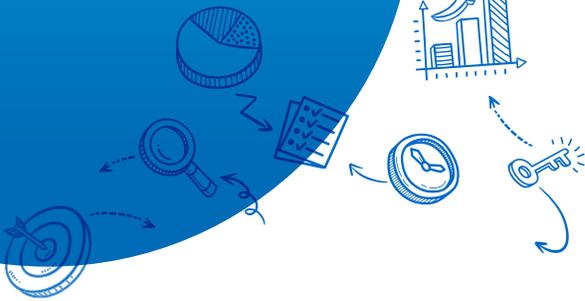
Asking community members to join in on your planning session is a great way to get diverse perspectives reflected in your plans.

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?



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



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

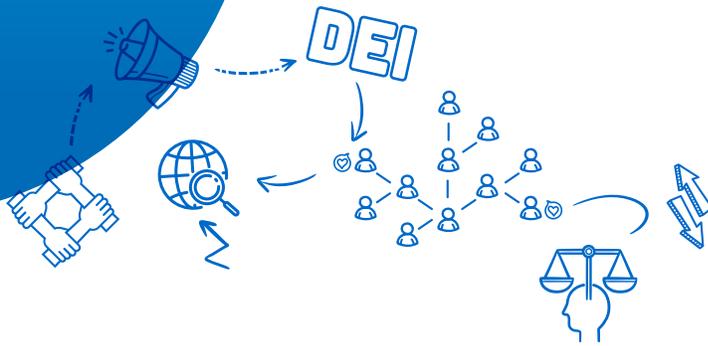
CHALLENGES

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?

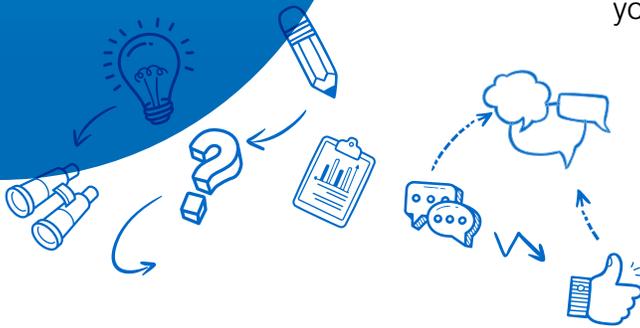
TIP 

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

VISION STATEMENT

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?

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.



BE A VIBRANT CLUB

NORTH AMERICA

YOUR CLUB LEADERSHIP PLAN

Rotary



HOW WE DID IT

We rewrote our values statement.

The updated language — which calls us “a service club of inspired individuals whose contributions improve lives in communities locally and worldwide” — unified our members, inspired prospective members, and generated interest in our community work.

We introduced creative meeting formats.

Our club provides innovative and flexible, cost-free meeting options:

Speed networking. This helps our members build relationships and rapport.

Service first Thursdays. On the first Thursday of each month, we meet at the public library to clean books and prepare and inventory multimedia materials.

1905 meetings. Our 1905 meetings honor the early days of Rotary tradition. Like the first Rotarians, we meet in small groups. Members can participate remotely by meeting at designated locations closer to their workplaces. We use Facebook Live to tune in simultaneously to our club president for the first half of the meeting. For the second half, we break into small groups to discuss a video presentation on the theme of the month.

The varied formats increased member engagement in a way that wasn't possible with traditional meetings alone. Even former Rotarians started to re-engage. While our weekly attendance may be around 60 members per meeting, our real-time Facebook Live videos that broadcast our 1905 meetings and traditional meetings have generated over a thousand views.

Our experience has taught us that it is possible to make changes in the spirit of innovation and flexibility yet maintain Rotary values. We discovered that there are many fun ways to serve and promote fellowship with Rotarians.

We relaxed attendance guidelines.

While we are committed to making our meetings more accessible to working members, we also wanted to continue regular meetings, because they foster the fellowship and camaraderie that our members enjoy. We revised guidelines to require only 50 percent attendance at the weekly meetings. Missed meetings can be made up at other Rotary meetings or by participating in a service activity.



START YOUR CLUB ON A PATH TO VIBRANCY

Vibrant clubs engage their members, conduct meaningful projects, and try new ideas. List the new ideas your club wants to try, and create a plan to increase community interest and attract more members.

As you develop your plan, use these tips and ideas, and let your club evolve.

Decide what you'd like your club to be like in three to five years.

- Plan an annual visioning session, and use the **Rotary Club Health Check** to identify your club's strengths and areas that need improvement.
- Use the **Strategic Planning Guide** to set long-term goals.

Hold club meetings that keep members engaged and informed.

- Conduct the **Member Satisfaction Survey** to find out what your members like and don't like about your club, and create a plan for implementing changes.
- **Vary your meeting format** to include a mix of traditional and online meetings, service projects, and social gatherings.

Prepare members for future roles to smooth leadership transitions.

- Ensure continuity by making appointments for multiple years, having a current, incoming, and past chair on each committee.
- Conduct on-the-job training for incoming club officers, and have job descriptions for each officer.

Develop strong relationships within your club.

- Find suggestions in **Introducing New Members to Rotary**.
- Sit with different people at each meeting.

Coach new and continuing members in leading.

- Appoint a club training committee to oversee training for members.
- Use the **Leadership in Action guide on starting a program** to develop members' leadership skills.

Decide on your annual goals, and enter them into Rotary Club Central.

- Focus on something your club is good at, and make it something your club is great at.
- Update committees once a month on your goal progress.

Communicate openly in your club.

- Share information at club meetings, on your club website, and through social media, and check regularly to see how members are feeling.
- Use the templates and resources in the Rotary **Brand Center** to create your club brochures and newsletters.

Adapt your club's bylaws to reflect the way the club works.

- Involve your members when you review your club's bylaws every year.
- Edit the **Recommended Rotary Club Bylaws** template to reflect new practices and procedures.

Make sure all members are involved in activities that genuinely interest them.

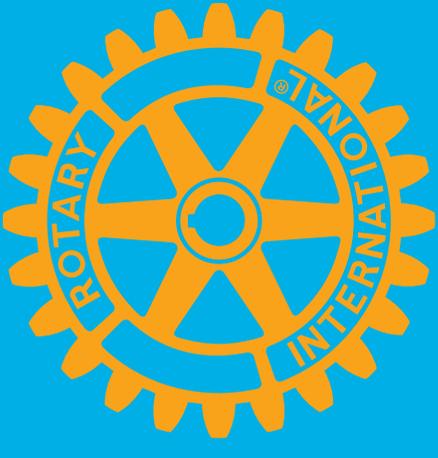
- Conduct a member-interest survey, and use the results to plan projects, activities, and engaging meetings.
- Get new members involved early by learning their interests and giving them a role in the club.

Create practical committees for your club.

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.



IMPACT BEGINS WITH YOU



CONNECT WITH A ROTARY CLUB TODAY

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

Be a part of the Rotary difference. Bring your passion, your perspective, and your purpose to Rotary.

To connect with a club in your area and learn more, visit us at www.rotary.org/join.



Rotary

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

CONNECT WITH US:



001-INA-(316)

THE ROTARY DIFFERENCE

Rotary is more than a service organization that's making a difference in your community.

We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.



Rotary

IMPACT ACROSS THE WORLD



With more than **1.2 million members** in clubs in almost every country, **we are improving communities around the globe**. As a member of Rotary, you'll have opportunities to change lives locally *and* to connect with other clubs to work on **international projects that address today's most pressing humanitarian challenges**, including fighting disease, providing clean water, supporting education, and promoting peace.

Our largest and proudest effort to date is our work to eradicate polio. We initiated the audacious polio eradication campaign in 1979, by vaccinating children in the Philippines. **With the help of our partners, we have since reduced polio cases worldwide by 99.9 percent.**



WE SEE DIFFERENTLY:

We are problem solvers working together to achieve a better world. Our members are deeply ingrained in the communities in which they live and serve, affording them insight into local challenges and access to the leaders, resources, and networking opportunities needed to strategize and take action to make lasting change.



WE THINK DIFFERENTLY:

Rotary clubs reflect the diversity of our communities and the breadth of viewpoints that comes from our members' varied professional and personal experiences. For more than 100 years, we have been applying different perspectives to create innovative, sustainable solutions that address the needs and challenges affecting our communities.

HOW ARE WE DIFFERENT?



WE LEAD DIFFERENTLY:

As Rotary members we hold ourselves to the highest ethical standards. Community members, community leaders, and other organizations seek us out because they know they can trust us to be effective partners and deliver on our promises.



OUR ACTIONS MAKE A DIFFERENCE:

Harnessing our unique perspectives and ideas gives us a shared purpose — one that compels us to take action. We roll up our sleeves, leverage our personal relationships with local partners and businesses, and apply our leadership skills as a way to get the job done and bring to life the changes we envision.



IMPACT BEGINS WITH OUR LOCAL CLUBS

The impact our members make takes shape at Rotary club meetings and activities. These gatherings allow you to join other passionate, visionary women and men regularly to discuss and act upon community needs. Rotary club meetings are also a place to strengthen connections to friends and neighbors and form meaningful relationships that last a lifetime.

And just as Rotary helps you invest in your community, it gives you an opportunity to invest in yourself. Many clubs offer continuous learning opportunities, with a broad range of workshops, conferences, guest speakers, and more — all aimed at helping you grow personally and professionally.



ROTARY TRAINING EVENTS

ROLE-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR-ELECT

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
<p>District Team Training Seminar February</p>	<p>Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.</p>	<p>District training committee</p>	<p>Trainers Assistant governors Committees</p>
<p>Presidents-elect Training Seminar (PETS) February or March</p>	<p>Club presidents-elect learn about their role, and work with assistant governors to set goals.</p>	<p>District training committee</p>	<p>Trainers Presidents (Basics)</p>
<p>District Training Assembly March, April, or May (after PETS)</p>	<p>Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.</p>	<p>District training committee</p>	<p>Trainers Presidents (Intermediate) Secretaries Treasurers Committees</p>

TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
<p>District Vibrant Club Workshop Determined by district</p>	<p>Club presidents, club membership committee chairs, club Rotary Foundation committee chairs, and interested Rotarians learn how membership, the Foundation, and public image work together to help fulfill Rotary's Action Plan.</p>	<p>District Rotary Foundation committee District membership committee District public image committee District training committee</p>	<p>Trainers</p>
<p>Grant Management Seminar Determined by district</p>	<p>Club presidents-elect (or appointees) learn how to manage Rotary grants.</p>	<p>District Rotary Foundation committee District training committee</p>	<p>Trainers (for in-person seminars) Trainers (for virtual seminars) Participants</p>
<p>Rotaract Club Officer Training Anytime after club open elections and before 30 June</p>	<p>Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.</p>	<p>District Rotaract representative</p>	<p>Trainers Participants</p>

DISTRICT 5790 EVENTS (2025 - 2026)

2025 Events						
Date(s)	Event	Type	Audience	City	Venue	
1/2/2025 - 1/11/2025	Cuba Trip	Service	All	Cuba		
2/1/25	District Leadership Training	Training	District Leaders	Fort Worth	TCC Trinity River	
2/2/25	DG Interviews	Business	PDG's	Flower Mound	Chamber of Commerce	
2/9/2025 - 2/13/2025	International Assembly	Training	DGE	Orlando, FL		
2/13 - 2/17/2025	District Cruise	Social	All	Caribbean	Cruise Ship	
2/27/2025 - 3/2/2025	PETS	Training	PE's, PN's, AG's	Dallas	Hyatt Regency DFW Airport	
4/5/25	Rotary Leadership Institute	Training	All	Fort Worth	TCC Northwest	
4/26/25	District Training Assembly	Training	Club Leaders	Fort Worth	TCC Trinity River	
May	Legacy Dinner	Fundraiser	Major Donors	TBD	TBD	
5/17/25	Rotary Leadership Institute	Training	All	Fort Worth	TCC Northwest	
6/14/25	District Conference / DG Installation	Business	All	Grapevine	Embassy Suites	
6/19 - 6/22/2025	RYLA	Service	RYLA Team	Denton	TWU	
6/21 - 6/25/2025	International Convention	Business	All	Calgary, Canada		
Jun - Aug (tentative)	Blood Drives	Service	All	TBD	TBD	
7/19/25	Rotary Leadership Institute	Training	All	Fort Worth	TCC Northwest	
7/31/2025 - 8/3/2025	RMDTI	Training	District Leaders	Pflugerville	Courtyard by Marriott	
8/16/25	Vibrant Club Workshop	Training	Club Leaders	Weatherford	Northside Baptist Church	
10/2/2025-10/4/2025	Zone Institute	Training	District Leaders	Minneapolis	TBD	
October	Polio Event	Fundraiser	All	TBD	TBD	
10/11/25	Rotary Leadership Institute	Training	All	Fort Worth	TCC Northwest	
TBD	District Governor Info Night	Business	DG Hopefuls			
11/8/25	Foundation Gala	Fundraiser	All	Grapevine	Embassy Suites	
12/7/25	PDG Xmas Party	Social	PDG's	Fort Worth	River Crest CC	

2026 Events

DISTRICT 5790 EVENTS (2025 - 2026)

Date(s)	Event	Type	Audience	City	Venue
January	Cuba Trip	Service	All	Cuba	
January	International Assembly	Training	DGE	Orlando, FL	
1/24/26	Rotary Leadership Institute	Training	All	Fort Worth	TCC Northwest
January - February	District Leadership Training	Training	District Leaders	TBD	TBD
January - February	DG Interviews	Business	DG Line		
2/14 - 2/19/2026	Cruise	Social - Int Service	All	Caribbean	Cruise Ship
2/26 - 3/1/2026	PETS	Training	PE's, PN's, AG's	Dallas	Hyatt Regency DFW Airport
April	District Training Assembly	Training	Club Leaders	TBD	TBD
4/11/26	Rotary Leadership Institute	Training	All	Fort Worth	TCC Northwest
6/6/2026 (tentative)	District Conference / DG Installation	Business	All		
6/13 - 6/17/2026	International Convention	Business	All	Taipei, Taiwan	
6/25 - 6/28/2026	RYLA	Service	RYLA Team	Denton	TWU

**PROGRAM AND EVENT CALENDAR FOR 2020-2021
SAN ANTONIO NORTH CENTRAL ROTARY CLUB**

July 2022	
11	Speaker Club Assembly
18	<i>Board Meeting</i>
25	Speaker
AUGUST 2022 MEMBERSHIP & NEW CLUB DEVELOPMENT MONTH	
1	Service/Social
8	Speaker
15	Club Assembly <i>Board Meeting</i>
22	Speaker
29	Fireside Chat/Membership Drive
TBD	Service Project: Stuff the Bus (HEB I-10 & DeZavala)
TBD	Winston School Officer Installation
SEPTMEBER 2022 BASIC EDUCATION & LITERACY MONTH	
5	No Meeting - Labor Day Holiday
12	Speaker
19	Club Assembly <i>Board Meeting</i>
26	Speaker
OCTOBER 2022 ECONOMIC & COMMUNITY DEVELOPMENT MONTH	
3	Service/Social
10	Speaker
17	Club Assembly <i>Board Meeting</i>
24	Speaker
31	District Service Project: Halloween at Morgan's Wonderland
TBD	Club Fundraiser: Paul Harris Dinner (Foundation Dinner)
NOVEMBER 2022 ROTARY FOUNDATION MONTH	
7	Service/Social
14	Speaker
19	Service Project: Turkey Run
21	Club assembly/board meeting
28	Speaker
30	Fireside Chat/Membership Drive
TBD	World Interact Week/Interact District Conference
DECEMBER 2022 DISEASE PREVENTION & TREATMENT MONTH	
5	Service Project: Holiday Gift Wrapping Club Assembly
12	<i>New Officer nominations</i>
19	No Meeting - Christmas Holiday
26	No Meeting - New Year's Eve Holiday
TBD	Holiday Party
TBD	Service Project: Elf Louise
JANUARY 2023 VOCATIONAL SERVICE MONTH	

**PROGRAM AND EVENT CALENDAR FOR 2020-2021
SAN ANTONIO NORTH CENTRAL ROTARY CLUB**

2	Service/Social
9	Speaker
14-16	Service Project: RYLA Chaperones
16	Club Assembly <i>Board Meeting</i>
23	Speaker - RYLarians
30	Speaker - RYLarians
FEBRUARY 2023	PEACE & CONFLICT PREVENTION/RESOLUTION MONTH
6	Club Assembly/Board Meeting
13	Service/Social: Valentine's Day Club Dinner
20	Speaker
TBD	Interact: Winston School Talent Show
MARCH 2023	WATER & SANITATION MONTH
6	Service/Social
13	Speaker
20	Club Assembly - PETS Update <i>Board Meeting</i>
27	Speaker
TBD	Service Project: Post Mardi Gras
TBD	Lonestar PETS
APRIL 2023	MATERNAL & CHILD HEALTH MONTH
3	Service/Social
10	Speaker Club Assembly
17	<i>Board Meeting</i>
21	Alamo Heights Night - Fundraiser
24	Speaker
MAY 2022	YOUTH SERVICE MONTH
1	Service/Social
8	Speaker
15	Club Assembly <i>Board Meeting</i>
22	Speaker
29	No Meeting - Memorial Day Holiday
JUNE 2022	ROTARY FELLOWSHIP MONTH
5	Service/Social
12	Speaker
19	Club Admin: Officer Installation
26	Speaker

2025 Rotary Multi District Training Institute
District Learning Agenda – Module Worksheet

5.	11:00 – 11:30 a.m.	Hands On Learning Plan Design – Small Groups - Intro	PADLF Monique Cabano
	Learning Outcome:	The Rotary Leader will assess District learning plan frameworks and models, along with learning principles, to formulate learning plans for specific District events.	
	Course Description:	Application of basic learning plan elements and design principles for District events - required , special, and supplemental.	
	Exercise:	In four small groups, and for each required RI learning event below, formulate a brief learning plan. Include logistics and curriculum elements.	
		1. District Team Learning Seminar - District Learning Seminar (DLT)	PDLF Arden
		2. Presidents-elect Training Seminar - LSPETS	PADLF Monique
		3. District Training Assembly - District Assembly (DA)	PDLF Arden
		4. District Vibrant Club Workshop (VCW)	PADLF Monique
	Logistics -	<ul style="list-style-type: none"> ✓ Date, Location, Rooms ✓ Budget ✓ Food ✓ Registration/Communication ✓ Staffing – Paid/Rotarians – Host Club ✓ Equipment and Supplies ✓ Team Meetings ✓ Sponsorships 	

5.	11:00 – 11:30 a.m.	Hands On Learning Plan Design – Small Groups	<i>continued</i>
	Curriculum -	<ul style="list-style-type: none"> ✓ Program Agenda/Modules ✓ Keynotes/Facilitators ✓ Learning Outcomes ✓ Course Descriptions ✓ Methods/Techniques ✓ Discussion Questions ✓ Resources and Materials 	
	Other Considerations -		
	Discussion Questions:	<ol style="list-style-type: none"> 1. Assess the last District Learning you attended. What was the most impactful element of that event. Why? 2. For each required RI learning event, formulate a brief training/learning plan. From <i>your own</i> plan, assess the most critical <i>logistics</i> element. Why? Then, assess the most critical <i>curriculum</i> element. Why? 	
	Outcomes/ Impacts:		
	Additional Comments:		

RMDTI DLF — Building Your District Learning Plan - Curriculum, PDG Lisa Herring

1. Perspective

Developing an understanding of the group's purpose, mission, vision, goals, and context is critical. Questions you might ask as you think about gaining perspective for facilitating a group or team:

- What is the purpose and mission of the group or organization?
- What is the organizational structure?
- How are decisions made?
- What does the leadership look like?

2. Purpose

It is essential to understand what the group or organization views as a successful meeting or event before determining the detailed requirements, specific deliverables, and how to measure results. Questions you might ask as you determine your group's needs and expectations:

- What are their ideal desired results or outcomes?
- What do we need to achieve in this meeting or during this event to meet their needs?
- What type of atmosphere do we need to create in order to accomplish the results they want?

3. People

It is common not to fully identify and include the important people who need to participate in an event or meeting. Once you have mapped out who and why people need to be in attendance, here are some additional questions to ask:

- What are the conflicts?
- What are the biases, preconceived ideas, and other potential barriers to success?

4. Product

While this may appear to be similar to purpose, it is more specific. Purpose is why we are having the meeting, product is what is produced as a result of the meeting. Questions to consider:

- What will be delivered?
- What is the most important thing we need to accomplish?
- What documentation do we want to walk out of the room with?

5. Place

This step is probably most overlooked by inexperienced facilitators. Thinking that a room or space will do is simply not true or effective. Don't leave the identification and selection of the physical space to someone else. This is an important step in virtual meetings as well, even though the space will be different. Questions to help determine your space needs are:

- How many participants will be attending?
- Are there any special needs for those participating?
- What special equipment is needed, such as computers, internet access, flipcharts, and wall space?

6. Process

Once you have considered the above five Ps, you are in a solid position to design a process that fits your group or organization's unique situation and needs. There are numerous processes that can be designed for different results, such as decision-making, improvement, problem-solving, strategic planning, etc.

We usually start with a clear facilitation agenda that provides clear guidance on the individual items needing attention, time allocations, and expected outcome. Then, select tools such as activities, questions, and exercises for each agenda item. Questions I consider when designing a process:

- Does the agenda item need dissemination, discussion, or decision (*this three Ds approach helps me determine what type of tool to use*)?
- What is the best flow for the agenda?
- How much time is needed for each item and what tools can be used effectively for the allocated time?

7. Practice

Visualizing and rehearsing the training/meeting, anticipating potential problems, and preparing appropriate contingency plans is essential.

On the day of the meeting or training, arrive before the participants. Test your equipment and make sure all your materials are ready. Finally, take a few minutes for yourself to check your appearance and visualize yourself facilitating a successful meeting.

8. Personal preparation

If you are not personally ready to perform, your participants will know it. This encompasses being mentally, emotionally, and physically ready to perform. Something I try to do before large facilitation events is to create a quiet moment the morning of the event. I visualize the event and the different parts of the agenda. The quiet also prepares me mentally and physically. I find that when I facilitate, I am standing and walking almost the entire time.

*****Effective facilitation planning and preparation make all the difference between a poor and unproductive training/meeting and one that is inspiring, motivating, fun and productive.**

RMDTI DLF - Building Your District Learning Plan - Effective Facilitation Techniques – Best Practices, PDG Lisa Herring

What are facilitation techniques? Trainers, facilitators and moderators use facilitation techniques to engage participants, understand group dynamics and ensure a meeting or training achieves its goal.

16 facilitation tools and techniques

1. Brainstorm

Brainstorming creates a creative group atmosphere that can often bring about fresh and unconventional ideas.

2. Set meeting/training agendas

While team members generally receive agendas before the meeting starts, review the schedule and objectives again at the beginning of the meeting so everyone in the group understands its direction. This step is particularly important at the start of unplanned or spontaneous meetings.

3. Break the ice

After the introduction, perform an ice breaker exercise so everyone gets comfortable in the group.

4. Delegate roles

Assign roles to the group members, such as asking someone to record the meeting's details or giving someone responsibility for checking the time. Rotate duties from meeting to meeting so everyone feels involved.

5. Set ground rules

Ensure the meeting stays calm and organized by setting rules such as raising your hand if you want to share an idea.

6. Take breaks

Long meetings can cause attendees to lose focus and become fatigued. Take regular breaks, ideally every 90 minutes during long meetings, to let the group get a drink or walk around. If you pause a meeting for lunch or a food break, provide healthy refreshments that stimulate the mind.

7. Provide a toolkit

The facilitator should provide the team with tools such as notepads, pens or pencils so they can take notes and record the meeting's details. Provide markers and a whiteboard if you or other attendees are giving a presentation.

8. Use a flip chart

Flip charts can provide a visual element to a meeting, particularly when brainstorming creative ideas. Place the flip chart at the front of the room and stand to the side while writing or discussing a topic so everyone can see. Write in clear and bold font, preferably in capital letters. Use different-colored markers or bullet points to break the content into smaller ideas.

9. Perform meta-planning

To engage all attendees, ask them to each share a keyword about the meeting's topic or main issue. Collect their ideas and share them with all participants. This is a simple way to come to quick conclusions.

10. Engage and manage group dynamics

If a meeting involves lots of conversation, separate into smaller discussion groups so the quietest participants can contribute to the decision-making process. Give the dominant personalities jobs to keep them focused and to encourage them to contribute their energy toward productive tasks.

11. Keep the group's mood upbeat

Break up serious discussions with fun, low-stress team-building or trust-building exercises. These games help keep attendees positive and productive.

12. Monitor group politics

If you notice power imbalances and hierarchies developing within a group, bring the focus back to the discussion through questions, solutions to problems, summaries and reflections. Keep positively energizing the panel.

13. Be alert

By being attentive, you can ensure the proceedings stay on track and the meeting progresses as planned.

14. Pause and think

Once you have established the main theme of the meeting, ask all the attendees to pause and think about it. Ask them to write down a few thoughts or ideas before the group begins discussing the topic together.

15. Group review

Get the group's perspective and feedback on the meeting's proceedings. This 10-minute exercise can help the facilitator understand what went well and what they can change for future meetings.

16. Make closing notes

Clearly document the training/meeting's proceedings and outcome, so everyone understands the concluding details. Summarize the training/meeting verbally as well as in writing.

**2025 Rotary Multi District Training Institute
 Learning Facilitators Agenda – Module Worksheet**

8.	2:00 – 2:45 pm	Table Talk: Introduction Making Your Learning Topics Come To Life	PADLF Monique Cabano
	Learning Outcome:	The Rotary leader will assess curricula plans with innovative strategies for Rotary high-level learning topics.	
	Course Description:	In-depth discussion and point of view sharing on innovative exercises, methods, and strategies to bring basic Rotary curricula areas/topics to life.	
	Exercise:	In four small groups, and for each learning topic below, formulate a brief innovative strategy to include in your own learning plan.	
		1. Raising TRF Awareness Inspiring International Service	PDLF Arden Riley
		2. Attracting and Engaging Members Enhancing Public Image	PDG Kelly Atkinson
		3. Advocating for Community Focusing on Vocational Service/Ethics	PDLF Arden Riley
		4. Building Service to Youth Highlighting Rotary Basics	PADLF Monique Cabano
	Discussion Questions:	<ol style="list-style-type: none"> 1. First, give a brief content overview of each learning topic. 2. Then, for each learning topic, formulate three strategies for bringing the topic to life. 3. Finally, for each learning topic, formulate your own "big rock" strategy and assess how you would bring it to life at your own learning event. 	
	Outcomes/ Impacts:		
	Additional Comments:		

DESIGNING YOUR ROTARY EXPERIENCE



GET INVOLVED IN WAYS THAT MATTER TO YOU

Rotary offers benefits for people of all ages and backgrounds. From learning more about the world to learning more about yourself, you can grow by engaging with Rotary's global network and the array of activities, programs, and interest groups that Rotary offers.

When you get involved in Rotary, whether as a Rotarian, Rotaractor, or program participant, you expand your perspective by honing your skills, learning from professionals, making new connections, and making a difference in your community and around the world.

We know that each member has a unique combination of interests, skills, and talents, and so each member will be attracted to different activities. This guide describes the options you can choose from to personalize your Rotary experience and get involved in ways that matter to you.



MAKE CONNECTIONS

Rotary is a global community with 1.4 million Rotarians and Rotaractors from clubs in nearly every country. This means you can connect with others near home or across the globe. Here are some ways you can make connections through Rotary.



- + ATTEND CLUB MEETINGS AND EVENTS.**
Introduce yourself to members in your club to get to know them better. Being genuinely interested in others shows people you value them, and these small interactions can lead to lasting friendships.
- + CREATE A MY ROTARY ACCOUNT.**
When you register for a [My Rotary account](#) and create a profile, you can access Rotary's online tools and locate and connect with members near and far using the [Find a Member](#) tool.
- + ATTEND DISTRICT MEETINGS AND EVENTS.**
Clubs are grouped into more than 500 districts worldwide. By connecting with other clubs and leaders in your district, you can learn how to get involved in Rotary beyond your club and make a greater impact.
- + GET INVOLVED WITH CLUB INITIATIVES.**
Volunteering to take part in a project, attend a meeting, or serve in a club role, such as being on a [committee](#), will let you work with others in meaningful ways and contribute to your club's impact. You can also suggest speakers from [service and project partners](#) or from other organizations that share Rotary's values. Ask your club how you can help.
- + VISIT ANOTHER CLUB.**
You can locate Rotary and Rotaract club meetings to attend using the [Find a Club](#) tool. You might think of ways to collaborate on club activities or hear of an idea you want to try with your club. Visiting other clubs fosters new connections and inspiration.
- + JOIN A ROTARY FELLOWSHIP.**
Meet others with similar interests by joining a [Rotary Fellowship](#), an international group of people with a common hobby, identity, culture, or vocation. This is a fun way to make friends and explore a pastime or profession.
- + JOIN A ROTARY ACTION GROUP.**
These include people around the world who have expertise and passion in a particular area, such as economic development, education, the environment, or safe water. Join a [Rotary Action Group](#) to share your knowledge, develop your skills, and make professional and personal connections.
- + PARTICIPATE IN A ROTARY FRIENDSHIP EXCHANGE.**
Experience different cultures and build international understanding and friendships. This program for Rotary members and friends prioritizes cultural immersion, international service, or vocational exchanges. [Friendship Exchange](#) participants take turns hosting one another in their homes and clubs.
- + ATTEND A PROJECT FAIR.**
Meet people with whom you can collaborate on international projects. [Project fairs](#) typically last two or three days and can include visits to project sites as well as opportunities to experience the local culture. These activities let visitors learn about the community and build long-lasting relationships with their hosts.
- + ATTEND THE CONVENTION.**
The [Rotary International Convention](#) is held in a different international city each year. You'll meet members from around the world, learn how to expand our impact, and enjoy inspiring talks from global leaders, celebrities, and activists.

PARTICIPATE IN MEANINGFUL SERVICE

Making a difference in the community is one of the top reasons people get involved in Rotary. We channel this commitment through five Avenues of Service — Club Service, Vocational Service, Community Service, International Service, and Youth Service. Here are some ways you can take part in meaningful service through Rotary.



+ SUPPORT YOUR CLUB.

You can help your club thrive by offering your expertise and skills through serving as a club officer, as a committee member, or in another role.

+ PARTICIPATE IN LOCAL SERVICE ACTIVITIES.

Find out what projects your club, neighboring clubs, and your district are working on and volunteer for one or more. Work with partners or conduct a community assessment to identify projects that would benefit your local area.

+ PARTICIPATE IN INTERNATIONAL PROJECTS.

Many clubs partner with clubs in other parts of the world to address a need in one of their communities. Together, they have more time and funding, as well as the expertise of members, partners, and Rotary program alumni to bring about sustainable, positive change. Find a project and get involved.

+ USE YOUR PROFESSIONAL EXPERTISE.

Many districts have a district resource network of local experts who can use their experience, technical knowledge, and project-planning skills to assist clubs in the design and implementation of meaningful projects. Contact your district international service chair to offer your skills to mentor clubs and improve communities.

+ SUPPORT AN INTERACT CLUB.

Interact clubs bring together people ages 12-18 to develop leadership skills while participating in service. If your club sponsors or co-sponsors an Interact club, you can help empower Interactors to make a difference in their communities and globally by supporting their service-learning projects.

+ PARTICIPATE IN ROTARY YOUTH LEADERSHIP AWARDS.

RYLA events provide opportunities to build leadership, communication, and problem-solving skills, while having fun and forming lasting friendships. Talk to your club and district leaders about getting involved by nominating participants or assisting event organizers.

+ WORK WITH A ROTARY COMMUNITY CORPS.

These groups of nonmembers partner with local Rotary and Rotaract clubs on service projects. By working with a Rotary Community Corps, you can build engagement in the area and make your projects more sustainable by positioning local leaders to pioneer change.

+ USE YOUR SKILLS WITH A ROTARY ACTION GROUP.

Use your professional skills to make a sustainable impact locally and globally through one of Rotary's more than 25 action groups. By leveraging people's expertise and our global network, Rotary Action Groups help clubs and districts plan and implement meaningful, large-scale humanitarian service projects.

+ APPLY FOR A GRANT.

If your project meets certain requirements, it might be eligible for funding from The Rotary Foundation. Explore the grant types and find one that's right for your project.

+ JOIN THE EFFORT TO ERADICATE POLIO.

Raise awareness about Rotary's work to end polio, donate to the PolioPlus Fund, or volunteer for a National Immunization Day. Post about polio on social media or include a link to endpolio.org in your email signature. Write to us to learn about upcoming trips for NIDs.

+ SUPPORT ROTARY'S CURRENT WORK.

You can do this by giving to The Rotary Foundation, which sustains thousands of projects in your community and around the world. The Foundation supports projects and programs that transform lives by addressing poverty, disease, conflict, and lack of education and water.

BECOME A LEADER

Rotary offers many opportunities to develop your leadership capabilities. Whether you're interested in a club or district role or in building new skills, leadership can be a cornerstone of your Rotary experience. Here are ways you can become a leader through Rotary.



+ SHARE YOUR IDEAS WITH YOUR CLUB.

You can help your club achieve its goals, improve its projects, and enhance the member experience. Clubs can evolve by being receptive to new and diverse perspectives, and your suggestion could become the next big initiative in your club or community.

+ EXPLORE LEADERSHIP COURSES.

Use Rotary's Learning Center to improve and practice your skills. Rotary's [professional development courses](#) include topics such as resolving conflict, public speaking, and networking. You need to have a My Rotary account, so be sure to [register](#) if you haven't already.

+ GIVE A SPEECH AT A CLUB MEETING.

Introduce yourself or discuss an area of expertise in order to practice your presentation skills. If your club meetings don't offer this opportunity, suggest it to your club leaders or contact [your local Toastmasters club](#) and ask to be a guest speaker.

+ BECOME A MENTOR.

Share your professional expertise, community knowledge, or Rotary information as a mentor. Ask if your club has a mentoring program, and if not, propose starting one. Take the [Mentoring Basics course](#) and learn to use your experience to help others grow.

+ LEAD YOUR CLUB.

Find out what committees and other leadership opportunities your club has, and volunteer for one that interests you. You'll learn more about your club and Rotary and gain skills in the process. Explore the [Club Leadership catalog](#) to find out about these roles.

+ ORGANIZE A CLUB EVENT.

Volunteer to coordinate a social gathering or service project, and gain skills including collaboration, public speaking, or managing other volunteers.

+ LEAD YOUR DISTRICT.

If you've served as a club leader and want to get more involved, find out how to do so at the district level. Learn about district roles with the [District Leadership catalog](#) and talk to your club and district leaders about available opportunities.

+ BUILD PEACE.

Join the [Rotary Positive Peace Academy](#), created with Rotary's partner, the Institute for Economics and Peace, to learn about building and sustaining peace and the Positive Peace framework. Learn about the [Rotary Peace Centers program](#), which trains leaders from communities around the world to address peace and development issues.

+ SERVE IN INTERNATIONAL LEADERSHIP ROLES.

Lead global groups of communities of people with similar interests, hobbies, professions, and passions by serving in a leadership role in a [Rotary Fellowship](#) or [Rotary Action Group](#).

EXPAND YOUR PERSPECTIVE

When you make connections, participate in meaningful service, and take leadership roles, you'll inevitably develop and expand your perspective. Here are more ways you can experience personal growth and expand your perspective through Rotary.



+ PERFORM ACTS OF KINDNESS.

Being gracious and caring empowers all parties involved and contributes to people's mental well-being. In Rotary, you have many opportunities to make a positive impact on someone's life by expressing kindness.

+ TAKE COURSES IN THE LEARNING CENTER.

Beyond the courses mentioned elsewhere in this guide, you can find online courses about specific Rotary programs, policies, and leadership roles, as well as more general skill development. Courses are available in more than 20 languages.

+ CONNECT WITH TOASTMASTERS.

Rotary's alliance with Toastmasters International means you can take [leadership courses](#) to develop and practice your skills. You can also [visit](#) a meeting or work with a Toastmasters club on joint initiatives.

+ ATTEND LEARNING EVENTS.

Connect with other members in your area by taking part in one of these informational events offered by your district. You'll learn more about Rotary and other clubs in your community. Visit your district's website or contact your club leaders to find out when your district's next event will occur.

+ WELCOME A YOUTH EXCHANGE STUDENT.

If your district is certified to participate in [Rotary Youth Exchange](#), you can offer to host or help welcome a student from another country, learn about their culture, share your culture with them, and create a memorable learning experience.

+ EXPLORE OTHER CULTURES.

Because Rotary and Rotaract clubs are all over the world, you can [visit clubs](#) when you travel and experience how diverse clubs in other towns or countries are. In addition to programs like Friendship Exchange or Youth Exchange, this is a way to broaden your intercultural understanding, build friendships, and learn about a region's history and customs.

HOW WILL YOU GET INVOLVED?

With so many ways to get involved, you can design the Rotary experience that suits you best. Talk to your fellow club members and leaders and share your interests and ideas. Take an active role in shaping your club. All of this will allow you to get the most out of your Rotary experience!

**2025 Rotary Multi District Training Institute
 Learning Facilitators Agenda – Module Worksheet**

11.	3:15 - 3:45 p.m.	Designing Your Learning Facilitator Experience: Best Practices	PDFL Arden Riley
	Learning Outcome:	To equip Rotary facilitators with the tools, strategies, and reflective practices needed to design and deliver engaging, inclusive, and impactful learning experiences tailored to the needs of diverse Rotary audiences.	
	Course Description:	Exploring proven strategies for leading engaging and impactful learning sessions. Through reflection, discussion, and shared experiences, facilitators will uncover what works and what doesn't and how to adapt their facilitation approach to better service diverse Rotary audiences.	
	Exercise:	Participants will take a few minutes to reflect individually on a past facilitation experience—either as a facilitator or participant—and jot down what went well and what could have been improved. Volunteers will then share key takeaways with the group to spark collective learning.	
	Discussion Questions:	<ol style="list-style-type: none"> 1. How do you think facilitating adult learners differs from working with younger learners, and what strategies have you found most effective when engaging adults in a learning experience? 2. What are some techniques you can incorporate into your facilitation to increase engagement and participation? 3. Think back to a facilitation experience you were part of - what makes it particularly effective, or what do you wish had been done differently to improve the outcome? 4. Finally, your experiences, challenges, and successful strategies, what is your own "big rock" takeaway or intention you want to carry forward into your own facilitation practice? 	
	Outcomes/ Impacts:		

	Additional Comments:	
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