

# LONE STAR P.E.T.S. 2020



## Rotary Opens Opportunities

February 27 - March 1, 2020

PRESIDENTS ELECT FACILITATOR GUIDE

Goal: To prepare incoming club presidents to become leaders of Vibrant Rotary clubs

Dear President Elect:

Congratulations on your selection as the 2020-2021 President of your Rotary club.

Our goal at Lone Star P.E.T.S. is to assist you in the preparation for your presidential year. You are already off to a good start by attending as a president elect. However, we cannot be your only training resource. We encourage you to incorporate the following learning opportunities in your preparation.

1. Reach out to the former presidents in your club. They can assist you as mentors.
2. Develop a good relationship with your president elect. Working together you can develop a continuity of programs and goals for your club.
3. Participate in each of your district's various training sessions and events. You will develop a broad knowledge of the many Rotary programs in which your club members may wish to participate.
4. Visit other clubs and see how they operate. Every Rotary club is different. You may see how other clubs solved a problem your club might be facing.
5. View the Learning Center training videos on the Rotary International website.

This workbook is the product of many volunteer hours. After numerous planning sessions with your district governors elect, Curriculum/Training Chair Mary Ann McDuff and members of her Team, Robert Greenstreet and Glenda Thomas, have put together an outstanding program from which you may use to learn and plan. Please thank them when you see them. It was truly a labor of love.

I encourage you to take full advantage of this learning experience. Develop relationships with your fellow president elects. Ask questions of your facilitators. Visit the vendors in the House of Friendship. Be inspired by our speakers. Complete the evaluations.

May the next two years be your best years in Rotary yet. Most importantly: HAVE FUN!!!!

Yours in Rotary,

John

John A. Jetter, PDG  
Lone Star P.E.T.S., Inc.  
2020 Operating Chair

A handwritten signature in black ink, appearing to read 'John A. Jetter', written in a cursive style.



# Table of Contents

## **SESSION A-1                    BECOMING A VIBRANT CLUB LEADER**

*Club Presidents and Presidents-elect will have an enhanced view of their role and function as club key leaders of Vibrant Rotary Clubs.*

## **SESSION A-2                    STRIVING TO BE A VIBRANT ROTARY CLUB**

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

## **SESSION A-3                    GROWING AND ENGAGING YOUR CLUB MEMBERSHIP**

*Club Presidents and Presidents-elect will possess tools needed to champion effective membership development plans for their respective clubs.*

## **SESSION A-4                    INCREASING HUMANITARIAN SERVICE BY SUPPORTING OUR FOUNDATION**

*Club Presidents and Presidents-elect will possess tools necessary to increase humanitarian service accomplished by their clubs by developing club member support for The Rotary Foundation.*

## **SESSION B-5                    REACHING OUT THROUGH SERVICE**

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

## **SESSION B-6                    FUNDRAISING THAT WORKS**

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

## **SESSION B-7                    ENHANCING COMMUNITY AWARENESS OF YOUR ROTARY CLUB**

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

## **SESSION C-8                    IDENTIFYING CHANGE FOR PROGRESS SAKE**

*Club Presidents will have insight about assessing needed change within their respective clubs in relation to Vibrant Club characteristics.*

## **SESSION C-9                    ARE YOU A LEADER WHO LEADS?**

*Club Presidents will be able to optimize their influence in each respective club by effectively leading and motivating toward creating and maintaining a vibrant club.*





## District Delivery: Session A-1 **Becoming a Vibrant Club Leader** (One hour)

	Step?	We want to accomplish?	How Long?
1.	Introduce topic and presenter (s)	Direct attention to the PETS Workbook, Tab 1: Becoming a Vibrant Club Leader. Refer to the three learning objectives Introduce presenter(s)	2 min.
2.	Front of room	1st Learning Objective: Identify district and RI resources to help the Club President identify and manage risk factors affecting a club. Presentation of key content (PPT can serve as outline and a handout for notes) Be sure to cover District and RI resources so PEs can connect with/access them. Refer participants to Newsletters page excerpt in PETS Workbook behind tab A-2.	15 min
3.	Table Discussion	2nd Learning Objective: Explain how the Club President can support the structure of a Vibrant Rotary club including collaborative efforts with the Club President-elect 3rd Learning Objective: List specific responsibilities of the Club President and Club President Elect 4th Learning Objective: Discuss the importance of a strong leadership team and committee structure in building a Vibrant and impactful Rotary Club. 5th Learning Objective: List specific elements of an engaging and successful Club experience at a Vibrant and impactful Rotary Club.  <b>See table facilitator instructions</b>	30 min.
4.	Room sharing	Ask for good ideas to share. (if you do not have portable microphones make sure to repeat the idea so all participants can hear)	5 min
5.	Q & A	Ask for any questions and respond briefly (repeat question before answering)	4 min
6.	Wrap Up and Evaluation	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	4 min

### Notes to District Presenters:

#### The tables should be numbered (Number holders in set up instructions)

Make sure participants have: PETS Workbook; Lead Your Club: President Edition (LYC); and Be a Vibrant Club.

If the PE and PN of the same club are at the same table, suggest they split up to gain different insights.

This is a good session for the DGE to be the presenter. The real focus of this session is to “provide participants with a big-picture overview” and a sense of how they, as club president, will fit in. Challenge them to improve their club by serving as Vibrant Club leaders and tell them about the resources and district support that can help them do that.

Make sure the table facilitators (AGs are ideal to use as table facilitators) **emphasize to the PEs that the LYC will serve as their “textbook” during the entire PETS weekend.**

At the wrap up, have table facilitators stand up and add “let’s thank them for their help” and lead the applause. Then have them move to the next higher number table (with facilitator at highest number table moving to table #1). (**NOTE:** If you do not have time, do the rotation at the beginning of A-2.)



**Lone Star P.E.T.S. 2020**  
**Table Facilitator Instructions**  
**Session A-1 Becoming a Vibrant Club Leader**

**Icebreaker: Introductions: Name, club, years in Rotary; what is your passion in Rotary? (5 Minutes)**

**Make sure participants have:**  
**PETS Workbook, Lead Your Club: President manual, Be a Vibrant Club brochure**

**Have participants go to Creating Your Club Leadership Plan checklist in PETS Workbook Tab A-1, and make notes about their club. This gives them an opportunity to benchmark where their club stands now. The notes are for their use and do not need to be shared at the table. Have them put down their pens when finished so you'll know when to start the table discussion below. (5 Minutes)**

**Overview of Table Facilitator Role:**

1. Encourage participation from everyone in group
2. Keep track of time
3. Address the questions as time permits

(Note: Add your own perspective if needed to stimulate discussion. We want to raise awareness and get them engaged, so mostly ask the questions, listen, and encourage the discussion)

4. **Capture 1 or 2 good ideas and share briefly if called upon**

**Table Discussion:**

1. What excites you most about your presidential year?
2. What is your biggest concern for the next year?
3. Refer to Be a Vibrant Club framework. How do collaborative efforts between a President and President-Elect strengthen a club?
4. Open your LYC to pp. iii-iv of Introduction: Circle the three most important responsibilities; share the reasons (PNs use p iii; PEs use p iv).
5. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
6. Any question(s) for front of the room?



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

FRIDAY, FEBRUARY 28, 2020

SESSION A-1

BECOMING A VIBRANT CLUB LEADER

### GOAL

**Club Presidents and Presidents-elect will have an enhanced view of their role and function as club key leaders of Vibrant Rotary Clubs.**

### OBJECTIVES

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

1. Identify district and RI resources available to help the Club President identify and manage risk factors affecting a club
2. Explain how the Club President can support the structure of a Vibrant Rotary club including collaborative efforts with the Club President-elect
3. List specific responsibilities of the Club President and Club President-elect
4. Discuss the importance of a strong leadership team and committee structure in building a Vibrant and impactful Rotary Club.
5. List specific elements of an engaging and successful Club experience at a Vibrant and impactful Rotary Club.

### REFERENCE MATERIALS

Lead Your Club: President -- Introduction; Your Job As Club President  
Lead Your Club: President -- Chapter 2: Leading Rotarians  
Lead Your Club: President -- Chapter 3: Running Your Meetings



# CREATING YOUR CLUB LEADERSHIP PLAN



Use this worksheet to start developing a plan that works for your club.  
Add strategies to meet **your club's needs**.

## Rotary Club of

## Rotary Year

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Our club has a strategic plan that reflects what we want our club to be like in three to five years</li> <li><input type="checkbox"/> Our club is engaging. We use the following meeting formats:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Traditional meetings:           /month</li> <li><input type="checkbox"/> Online meetings:               /month</li> <li><input type="checkbox"/> Service meetings:           /month</li> <li><input type="checkbox"/> Social events:               /month</li> <li><input type="checkbox"/> Other:</li> <li><input type="checkbox"/> Other:</li> </ul> </li> <li><input type="checkbox"/> Our club ensures continuity:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Members prepare for leadership positions</li> <li><input type="checkbox"/> Past, present, and future leaders participate in making decisions</li> </ul> </li> <li><input type="checkbox"/> Our club has fun social activities planned for the year:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Networking and socializing events</li> <li><input type="checkbox"/> Events that welcome families</li> </ul> </li> <li><input type="checkbox"/> Our club has a comprehensive training plan that includes:               <ul style="list-style-type: none"> <li><input type="checkbox"/> District conference</li> <li><input type="checkbox"/> District membership seminar</li> <li><input type="checkbox"/> District public image seminar</li> <li><input type="checkbox"/> District Rotary Foundation seminar</li> <li><input type="checkbox"/> New member orientation</li> <li><input type="checkbox"/> Online courses on the Learning Center                   <ul style="list-style-type: none"> <li><input type="checkbox"/> Club Officers Basics course</li> <li><input type="checkbox"/> Membership online course</li> </ul> </li> <li><input type="checkbox"/> Presidents-elect training seminar</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Our club has entered its annual goals in Rotary Club Central</li> <li><input type="checkbox"/> Our club has a communication plan for members and for the community:               <ul style="list-style-type: none"> <li><input type="checkbox"/> We use social media tools like Facebook</li> <li><input type="checkbox"/> Our club website is active and current</li> <li><input type="checkbox"/> Other:</li> <li><input type="checkbox"/> Other:</li> <li><input type="checkbox"/> Other:</li> </ul> </li> <li><input type="checkbox"/> Our <b>club's bylaws are current and</b> reflect our structure and practices</li> <li><input type="checkbox"/> Our club has strategies for keeping all members active in the club:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Members are involved in projects</li> <li><input type="checkbox"/> New members are assigned mentors</li> </ul> </li> <li><input type="checkbox"/> Our club has committees that support our needs:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Administration</li> <li><input type="checkbox"/> Membership</li> <li><input type="checkbox"/> Public relations</li> <li><input type="checkbox"/> Rotary Foundation</li> <li><input type="checkbox"/> Service</li> <li><input type="checkbox"/> Other:</li> <li><input type="checkbox"/> Other:</li> <li><input type="checkbox"/> Other:</li> </ul> </li> </ul> |
|---|---|



# Newsletters

Our newsletters help you stay current on the topics that interest you most. Anyone can subscribe once they create an account and sign in. To get started as a new subscriber, or to make changes to your existing subscriptions, click the button below.

**MANAGE SUBSCRIPTIONS**

## **End Polio Now**

An update about Rotary's polio eradication efforts that includes inspiring stories and the latest statistics.

## **Giving & Grants**

Information to help you support Rotary's work through contributions and grant-funded activities.

## **Membership Minute**

Rotary stories and the latest membership development ideas, strategies, and resources.

## **Peace in Action**

A forum for the Rotary Peace Centers community.

## **Rotary Convention**

News, updates, and deadline information about Rotary's annual convention

## **Rotary Leader**

Practical information to help club and district leaders achieve success.

## **Rotary Service**

Information to help Rotary members plan effective and inspired service projects.

## **Rotary Weekly**

An update on news and information for Rotary members, as well as developments from around the Rotary world.

## **Rotary Youth Exchange**

Information and updates on current Youth Exchange events and resources.

## **The Rotarian Newsletter**

Highlights from this month's issue of The Rotarian magazine.

## **Training Talk**

The latest RI training news, including RI mailings, RI Board decisions that affect training, and training tips.

## **Vocational Service**

News and resources related to vocational service.

## **Young Leaders in Action**

News and developments about Rotary's youth and young adult programs: Interact, Rotaract, and RYLA.

[illegible]



District Delivery: Session A-2 **Striving to Be a Vibrant Rotary Club** (One hour)

	Step?	We want to accomplish?	How long?
1.	Introduce topic and presenter(s)	Direct attention to the PETS Workbook, Tab 2: Striving to Be a Vibrant Rotary Club Refer to the three learning objectives Introduce presenter(s)	2 min.
2.	Front of room	Presentation of key content (PPT can serve as outline and a handout for notes) <b>Stress the benefits of using Rotary Club Central. Refer to the Rotary Citation as a primary planning tool.</b>	15 min
3.	Table Discussion	1 <sup>st</sup> Learning Objective: Outline the goal planning process for setting goals and developing action plans for the club 2 <sup>nd</sup> Learning Objective: Explain the benefits of strategic planning in maintaining a vibrant club 3 <sup>rd</sup> Learning Objective: Describe how to use the PETS planning worksheet in preparation for using Rotary Club Central  <b>See table facilitator instructions</b>	25 min
4.	Room sharing	Ask for good ideas to share.	10 min
5.	Q & A	Ask for any questions and respond briefly	4 min
6.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. <b>Proceed with transition to next module topic and facilitator.</b>	4 min

**Notes to District Presenters:**

**If you did not rotate table facilitators, do so now.** Have facilitators stand and have them move to the next higher number table (facilitator at highest number table moves to Table #1).

This session assumes PEs and PNs have prior knowledge of Rotary Club Central in terms of how to access and value of this tool.

This is a great session to involve AGs with participants as PEs and PNs begin to explore planning tools.

This session introduces the goal-setting process and tools available. DGEs can set expectations and timelines during this session with their respective PEs and PNs.

At the wrap up, have table facilitators stand up and add “let’s thank them for their help” and lead the applause. Then have them move to the next higher number table (with highest to #1).



# Lone Star P.E.T.S. 2020

## Table Facilitator Instructions Session A-2 Striving to Be a Vibrant Rotary Club

### Overview of Table Facilitator Role:

1. Encourage participation from everyone at table
2. Keep track of time
3. Address the questions as time permits

(Note: We want to raise awareness and get them engaged, so mostly ask the questions, listen, and encourage the discussion. Add your own perspective if needed to stimulate discussion.)

4. **Capture 1 or 2 good ideas and share briefly when called upon**

### Table Discussion: (25 Minutes)

1. Where do you stand in setting your club's goals for the coming year?
2. Refer to pp. 1-2 in LYC. What steps help create meaningful goals and effective action plans for your Rotary club?
3. Refer to p 3 in LYC. What are the benefits of a three year strategic plan? Then point out the Strategic Planning Guide in the PETS Workbook.
4. **Refer to the goals shown on the Rotary Club Central PETS Planning worksheet in the PETS Workbook.** How does using the framework: Current State /Future State/ Strategies/Action Steps help your club achieve its goals?
5. Refer to pages 29-32 in the LYC. What are the benefits of sound financial and risk management procedures ? Identify three ways that you will ensure good stewardship of club funds; share your reasons with the group.
6. Give participants a couple of minutes to jot down ideas on the notes page at the end of this module.
7. Any questions for front of the room?



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

FRIDAY, FEBRUARY 28, 2020

SESSION A-2

STRIVING TO BE A VIBRANT ROTARY CLUB

### GOAL

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

### OBJECTIVES

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

1. Outline the goal planning process for setting goals and developing action plans for the club
2. Explain the benefits of strategic planning in maintaining a vibrant club
3. Describe how to use the PETS planning worksheet in preparation for using Rotary Club Central

### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 1: Planning Your Year





# STRATEGIC PLANNING GUIDE



# 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.

## ABOUT THIS GUIDE

Just as a map guides people from one location to their destination, a strategic plan that is rooted in action guides an organization through achieving its goals and, ultimately, fulfilling its strategic vision. Strategic plans are important for Rotary and Rotaract clubs, too. Our survey results have shown us that clubs that develop and follow a strategic plan are stronger than clubs that don't because they have more satisfied members who view their clubs and Rotary more positively overall.

Use this Strategic Planning Guide to help you set long-term priorities as well as annual goals that 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 OUR CLUB DOING NOW?	PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?	PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?	PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?
<ul style="list-style-type: none"><li>• Identify strategic issues to address</li><li>• Determine club's strengths and weaknesses</li><li>• Assess member satisfaction and needs</li><li>• Identify opportunities and challenges in the community</li></ul>	<ul style="list-style-type: none"><li>• List five to seven characteristics you want your club to have</li><li>• Create a vision statement</li></ul>	<ul style="list-style-type: none"><li>• Set strategic priorities</li><li>• Set annual goals</li><li>• List the activities, timeline, and resources you'll need</li></ul>	<ul style="list-style-type: none"><li>• Monitor progress toward your annual goals</li><li>• If you missed your targets, determine why</li><li>• Adjust your action plans</li></ul>

## GETTING STARTED

- Assemble a strategic planning team made up of past, present, and incoming club leaders to develop the plan and make sure it's helping your club achieve its goals.
- Ask a non-Rotarian/Rotaractor or a club member that is not in a leadership position to facilitate strategic planning meetings.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision reflects Rotary's official strategic vision.
- Align your club's goals to reflect those of your district and Rotary's [strategic plan](#).

## PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?

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

- Determine your club's strengths and weaknesses by gathering comments from members
- Identify opportunities and challenges in the community by meeting with other community leaders

### IDENTIFY STRATEGIC ISSUES

What are the critical issues or concerns that your club wants to address? Strategic issues are those critical unknowns that are driving you to embark on a strategic planning process. These are issues that are looking for a solution or decision. Think about what issues you want to address with this strategic plan.

Potential questions to ask your members:

- How will we increase our membership and engage members in our club?
- How can we attract a diverse group of members?
- How can we include more community members in our club activities?



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

### STRATEGIC ISSUES

## STRENGTHS AND WEAKNESSES

List what your club does well and what your club could improve.

### STRENGTHS

### WEAKNESSES



## TIP

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get your members' insight and help you identify your club's strengths and weaknesses.

## IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

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

### OPPORTUNITIES

### CHALLENGES

## PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

### CLUB CHARACTERISTICS

Rotary's vision statement asks 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, e.g. fun, service-oriented, innovative, representative of the community, etc.

### CHARACTERISTICS

### VISION STATEMENT

A vision statement defines your desired future and provides direction for what you want your club to be. Write a one-sentence vision statement with your strategic planning team using the list of club characteristics as a reference.

Potential questions to consider:

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

## TIP



Your vision statement should resonate with club members. One example could be: "Our vision is to be recognized as the service club that supports youth in our community."

### VISION STATEMENT

# PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?

## STRATEGIC PRIORITIES

Your strategic priorities should help you achieve your vision. These priorities answer the question, “How will we succeed?” Develop your most important strategic priorities — those that will have the biggest impact as your club works toward its vision.

Consider the following when you develop strategic priorities:

- The Rotary vision statement and [strategic plan](#)
- Your club’s strengths and weaknesses
- Your district’s goals
- Your community’s opportunities and challenges
- Your club members’ opinions
- What you can achieve in three to five years

## STRATEGIC PRIORITIES

## ANNUAL GOALS

When you have set your strategic priorities, you can develop yearly goals that support them. Write down your strategic priorities. Then list your annual goals, along with the actions you’ll take, the resources you’ll need, and who will lead the effort to meet each goal. Set a timeline for each. [Rotary Club Central](#) can also assist you in setting goals and tracking achievements.



TIP

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



### STRATEGIC PRIORITY 1: \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

### STRATEGIC PRIORITY 2: \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

### STRATEGIC PRIORITY 3: \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

### STRATEGIC PRIORITY 4: \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE



## PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?

### MONITOR PROGRESS

You'll need to track progress toward your annual goals with your strategic planning team and suggest changes to action plans if needed. You may want to try a new approach or allocate more resources to your goals.

Consider the following when monitoring progress:

- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?



# TIP

**Rotary Club Central**  
can assist you in  
tracking progress  
toward your goals.

### GOAL PROGRESS REVIEW PLAN

### REVIEW AND ADJUST

As you review the progress you've made, list your goals, including any goals that were not met and the reasons why. Determine what adjustments or actions should be taken to achieve those unmet goals.

Consider the following when identifying and listing your missed targets:

- What goals were met?
- What goals were not met?
- What are the top reasons we fell short of those goals?
- What adjustments need to be made to help us achieve those goals?

### STRATEGIC PRIORITY 1: \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

### STRATEGIC PRIORITY 2: \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

### STRATEGIC PRIORITY 3: \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

### STRATEGIC PRIORITY 4: \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

This is a listing of goals that are found in Rotary Club Central, and is meant to serve as a worksheet. This document will not be collected and your club is encouraged to log on to [RCC.Rotary.org](http://RCC.Rotary.org) to enter them in to Rotary Club Central.

**MEMBERS & ENGAGEMENT** | Goals and Achievements are set as a #

- Club membership
- Service participation
- New member sponsorship
- Rotarian Action Group participation
- Leadership development participation
- District conference attendance
- Rotary Fellowship participation
- District training participation

**ROTARY FOUNDATION GIVING** | Goals are set as a #, Achievements come from Rotary

- Annual Fund contributions
- PolioPlus Fund contributions
- Major gifts
- Bequest Society members
- Benefactors

**SERVICE** | Goal and Achievement is set as a #

- Service projects

**YOUNG LEADERS** | Goals and Achievements are set as a #

- Rotaract clubs (Achievement comes from Rotary)
- Interact clubs (Achievement comes from Rotary)
- Inbound Youth Exchange students
- Outbound Youth Exchange students
- RYLA participation

**PUBLIC IMAGE** | Goals are set as a #, Achievements are set as a # or no/yes

- Strategic plan (yes/no)
- Online presence (yes/no)
- Social activities (#)
- Update website and social media (#)
- Media stories about club projects (#)
- Use of official Rotary promotional materials (no/yes)

**ROTARY CITATION** | Goals are set as a #, Achievement are set as a # or no/yes

Club Membership Committee (no/yes)

Conduct a member classification survey (no/yes)

Alumni networking event (no/yes)

Club Foundation Committee (no/yes)

Polio fundraising or event (no/yes)

Service project in an Area of Focus (no/yes)

Post successful club projects (no/yes)

Collaboration with non Rotary partner (no/yes)

Club members talking with media (no/yes)

Connect families (no/yes)

Connect professionally (no/yes)

Connect community (no/yes)

# Message from the Strategic Planning Committee

*By Stephanie A. Urchick, chair of Rotary's Strategic Planning Committee*

When we began developing a new strategic plan for Rotary over two years ago, we started by taking a look in the mirror. We asked hard questions as we performed a thorough self-assessment, all the while acknowledging the changing world around us. Once we identified gaps between who we are and who we need and want to be, we looked to you. We asked more than a million people from across the world to share their input with our Strategic Planning Committee through focus groups and surveys. Each goal in our plan is based on feedback from leaders, members, and Rotary participants who want the organization to achieve its vision. Thank you for sharing your passion and insight—we heard you!

Our new strategic plan is different from our past plans. This will be our Action Plan—our organization's call to action to work together to build a stronger future. This plan will help us realize what's truly possible when People of Action unite, connect with others who share our values, and commit to creating change in the world and within ourselves.

Our Action Plan is not about wiping away our tradition or tried-and-true core principles. It's about making our organization stronger so that our values will last for years to come. It's about using effective tactics to strengthen the organization at all levels. It's about ensuring that every person who engages with us has a meaningful, valuable and fulfilling experience. It's about changing more lives and communities for the better.

We are committing ourselves to increasing our impact on the world, expanding our reach, enhancing the experiences and engagement of Rotary participants, and increasing our ability to adapt and be innovative. Over the next several years, we will be exploring, implementing and refining a series of initiatives designed to achieve these goals. While the Action Plan focuses on Rotary International and the corporate-level activities that will drive us toward our vision, much of it also translates to a club and district level.

What does this mean for you? Each club should have the same priorities as the Action Plan. What can you do to help reach these goals? Take into consideration the priorities and ideas in this plan. How can you make your club and the experiences of its members the best it can be?

After considering how your club can have the most impact, use the [strategic planning guide](#) as your toolkit. Use the priorities and tips to develop your own plan of action, align with our priorities and support our shared goals. Tailor your plan so that it is the most effective for your club and engages your members and the members of your community. We will be audacious and innovative in how we implement Rotary's Action Plan and we encourage you to be the same.

You helped build this Action Plan and we will use it to strengthen Rotary so that together, we can act boldly to help make the world better for generations to come.



## ROTARY'S VISION STATEMENT

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

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.

To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next five years.

## ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

### **INCREASE OUR IMPACT**

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

### **EXPAND OUR REACH**

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

### **ENHANCE PARTICIPANT ENGAGEMENT**

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

### **INCREASE OUR ABILITY TO ADAPT**

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

## ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

**FELLOWSHIP**  
**INTEGRITY**  
**DIVERSITY**  
**SERVICE**  
**LEADERSHIP**

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.



[rotary.org/strategicplan](https://rotary.org/strategicplan)

# A Changing Rotary For A Changing World



**This report to the 2019 Rotary International Convention is an update on what the Secretariat has accomplished this year and how we continue to work hard to serve you — our members — so you can continue to serve your communities.**

*From Rotary International General Secretary John Hewko*

## Building a stronger Rotary

Rotary's long-term membership strategy aims to attract a diverse set of new leaders who share our commitment and vision for creating lasting change while also making the club experience more engaging so even more of our current members stay.

The first step to strengthening Rotary is to adapt to today's realities and challenges, so we remain relevant to current and prospective members.

Many clubs are implementing innovative ways to involve members and the community in Rotary. Whether they do it by creating new membership types, starting new clubs that accommodate busy schedules and different interests, or thoughtfully reexamining the style and frequency of their meetings, these clubs are discovering the value of changing to meet the diverse needs of today's business, community, and civic leaders. To explore and find your own innovative solutions visit [rotary.org/flexibility](https://rotary.org/flexibility) for examples, FAQ, and other resources.

The manage membership leads program helps Rotarians connect with prospective members, relocating members, and those referred by current Rotarians. We received more than 15,000 membership inquiries this year, which resulted in about four new members joining Rotary each day.



## Working closely with Rotaract

To extend Rotary's impact far into the future, we need to invest in the Rotary leaders of tomorrow. Nowhere is the passion for Rotary's future more visible than in our **Rotaract clubs**. In more than 9,000 clubs worldwide, Rotaractors demonstrate Rotary's values and passion for leadership, service, fellowship, diversity, and integrity.

This past year, RI President Barry Rassin challenged us to expand Rotaract membership and embrace every Rotaract club. This push resulted in the creation of 863 new Rotaract clubs.

You can help grow Rotary and strengthen connections with young leaders. Review the [Rotaract Handbook](#), take an [online course](#) about starting a Rotaract club, or watch the [Growing Rotaract webinar](#).

## The digital experience

Part of improving the Rotary experience is making sure that members have the tools they need to run their clubs, learn new skills, apply for grant funding, and quickly, securely, and easily contribute to The Rotary Foundation.

We listened to ideas from members and enhanced several online tools to better meet members' needs. Tools that now offer a better user experience include:

- **Rotary Club Central**: Clubs use Rotary Club Central to set strategic and measurable goals each year. Almost 20,000 clubs have set goals in 2018-19.
- **The Learning Center**: Launched in August, Rotary's new online learning platform offers more materials and has made learning more fun. The site includes features like virtual badges that users can earn by completing courses, dashboards that track their progress, and coming soon, social learning in which members can share documents on course topics. More than 350 courses are offered in 20 languages.
- **The Grant Center**: This is where clubs go to manage their grants from The Rotary Foundation from application to final report. This year, we redesigned the district grant application to make it easier to use.
- **Making an online donation**: Donors can now donate quickly and securely from their mobile devices and receive immediate acknowledgment of their contributions. It's also easier now for club officers to give on behalf of their club or its members.

Building on the success of these projects, we have already started enhancing other digital tools:

- Peer-to-peer online giving will empower Rotary's donors to raise money for The Rotary Foundation on social media. Soon, you'll be able to use your personal and social networks to raise funds to honor important events like birthdays or participation in athletic events.
- My Rotary will be easier to navigate and search from any device. Club and district leaders will be able to manage their information quickly and easily while staying connected with Rotary. This will allow you to focus on what matters: serving your clubs, your members, and your community.

## Serving our communities

Rotarians are people of action, motivated to make their communities better by making a direct and lasting impact through service. Through our six areas of focus and our fight to end polio, Rotary continues to create lasting and positive change.

## Making progress to end polio

Working with our [partners](#), Rotary has made [incredible progress](#) to polio despite enormous challenges. We're optimistic that we can finish the job, but getting to zero cases is going to take even more perseverance.

Nigeria has remained polio-free since 2016. We're employing new ways to reach more children in some of the most difficult places to deliver the polio vaccine, like Pakistan and the Lake Chad region in Africa.

[World Polio Day](#) continues to gain momentum as a global day of awareness and advocacy. On 24 October, clubs proudly highlighted their contribution to polio eradication by organizing more than 4,200 community [events](#) in more than 100 countries to educate and engage the public.

In Egypt, Rotary members took over the streets of Port Said for a run, a car rally, and a blood donation drive. In Spain, the Rotary Club of Córdoba hosted a World Polio Day fundraiser and donated 50 specially equipped bicycles to polio survivors. And in Brazil, hundreds of members worked alongside the Ministry of Health to promote polio immunization throughout the country, helping vaccinate more than 11 million children.

## Funding your global projects

Rotary clubs and districts worldwide show great enthusiasm for [global grants](#), as the number of applications and approvals increases year after year. During this Rotary year, 1,117 global grant

applications had been approved, with total funding of \$79.7 million (as of 1 May). Worldwide, 90 percent of districts and 13 percent of clubs are participating in global grants to make the world better through sustainable projects. In addition, 451 district grant applications were approved — representing 83 percent of districts worldwide — to support more than 12,000 activities.

As part of our focus on project sustainability and impact, any club or district that applies for a global grant to support a humanitarian project or a vocational training team are required to conduct a [community assessment](#). These assessments help our members understand the community they wish to serve and what it needs, forge stronger relationships with community partners, and clarify what success would mean for that community and the beneficiaries. These assessments make all the difference in a project's long-term success, or sustainability.

Our regional grants officers continue to help all Rotary members apply for and start their projects. Grant officers can review ideas, advise on the project's eligibility for a grant, share resources, outline what is needed for the application, and ultimately save clubs and districts a lot of time.

## Supporting The Rotary Foundation

We set a comprehensive fundraising goal of \$380 million for the year. Thanks to the generosity of our donors, as of 30 April, Rotarians and friends of the [Foundation](#) had raised \$318 million toward this goal.

For the [11th consecutive year](#), the Foundation received a four-star rating from Charity Navigator, the leading independent charity evaluator in the U.S. This rating placed the Foundation among the top 1 percent of charities evaluated by Charity Navigator.

This year, The Rotary Foundation established the [Rotary Disaster Response Fund](#). Districts that have been affected by a disaster can now use Rotary disaster response grants to support their own projects or work with established relief organizations to help their communities recover. Districts should work closely with officials and local groups to ensure that the funding will meet a specific community need.

## Partnering for impact

Rotary has developed [partnerships](#) with many organizations, expanding our reach and opportunities to serve.

This year, we've signed agreements to renew or extend our work with several organizations, including the U.S. Peace Corps, Ashoka, and ShelterBox. Working with our partners, our members have been able to plan effective and sustainable projects that fill the needs of their communities.

## Working for peace

Each year, Rotary awards up to 100 fully funded [fellowships](#) for dedicated leaders who want to study at one of our peace centers. For programs that started in 2019, we had more applicants than ever before — a 44 percent increase from last year. Nearly 600 qualified applicants were interested in studying peace and conflict resolution. There are now 98 fellows studying at Rotary Peace Centers in Australia, England, Japan, Sweden, Thailand, and the U.S.

The Rotary Peace Centers professional development certificate program, a three-month course in peace and conflict resolution, will become a one-year program that emphasizes peace, development, social impact, and leadership. We are working to establish certificate program centers in four priority regions around the world by 2030. The first center will be open by 2021.

## Telling our story

Around the world, clubs and districts are sharing compelling and impressive stories about all the ways that Rotary members are [people of action](#), as part of our worldwide effort to raise awareness and understanding of Rotary. By positioning ourselves as people of action, we show the public that Rotarians have the unique experience, vision, connections, and drive that enable them to make an impact. It also illustrates how we bring our vision to life.

- This year, the campaign grew and built momentum as we added creative materials, including a new video and photos, additional templates for print ads, and social media posts that feature powerful new action verbs.
- [The Rotary Brand Center](#) is the key online tool that helps clubs create their own visual and digital materials. During this Rotary year (as of 1 May), more than 230,000 visitors had come to the Brand Center to download 150,000 ads, resource guides, images, and other assets to help them tell the story of the impact they're making.
- In response to member feedback, we're updating the Brand Center to make it easier to download brand assets, templates, and other resources for telling Rotary's story.
- Through the power of [virtual reality](#), we are helping potential supporters and members experience the power of Rotary. In October, we introduced our newest virtual reality film, "[Two Drops of Patience](#)." This immersive film shows viewers what it takes to vaccinate children against polio. Virtual reality has given us a creative way to engage potential and current donors, members, and the public.

## Rotary in the media

- In November, [Rotary Day at the United Nations](#) was held in Nairobi, Kenya, for the first time. The event focused on youth innovation and finding solutions to some of our most pressing challenges. The six Rotary People of Action: Young Innovators who were recognized for their forward-thinking solutions were featured in Huffington Post (Canada), El Diario, La Vanguardia, SABC (South Africa Broadcasting Corporation) News, KTN News Kenya, and more, reaching 367,000 people. We reached 10 million people through social media.
- Rotary was featured positively in 53 news stories during the [2018 Rotary International Convention in Toronto, Canada](#). Our social media channels published 1,014 posts in eight languages, reaching more than 6 million people.
- More than 80 news stories that mentioned Rotary and polio were published in 2018-19, including a [Time magazine opinion piece](#) written by President Barry Rassin and WHO Director-General Dr. Tedros Adhanom Ghebreyesus. It highlighted progress and challenges in the fight to end polio.
- In November, Rotary received the [Shorty Award for Social Good](#) for its 2017 World Polio Day livestream event, joining winners such as Bill Nye, J.K. Rowling, Malala Yousafzai, the Alzheimer's Association, and National Geographic.

## Engaging social media

This year, we used our social media channels to inspire conversation, show examples of our impact, and engage supporters in our work. We did this by:

- Launching a new video series, [Field Notes](#), which takes viewers around the world to see how our members are people of action
- Traveling with Jeffrey Kluger, an award-winning journalist from Time magazine, and documenting [details of his trip of a lifetime to Nigeria](#) to visit and participate in the polio eradication efforts
- Creating interactive videos on such topics as travel as a force for peace with [Rick Steves](#) and astrophysics with [Fabio Pacucci](#)

[illegible]



District Delivery: Session A-3 **Growing and Engaging Your Club Membership** (One hour)

	Step?	We want to accomplish?	How long?
1.	Introduce topic and presenter(s)	Direct attention to the PETS Workbook, Tab 3: Growing and Engaging Your Club Members. Refer to the three learning objectives. Introduce presenter(s)	2 min.
2.	Front of room	Presentation of key content (PPT can serve as outline and a handout for notes) Emphasize sources of help within the district for membership development (attracting new members, engaging all members, retaining members through engagement)	15 min
3.	Table Discussion	1 <sup>st</sup> Learning Objective: Share strategies and best practices to attract and engage members to improve retention 2 <sup>nd</sup> Learning Objective: Describe how a club President can create a club atmosphere that is welcoming to all groups 3 <sup>rd</sup> Learning Objective: List key elements of club membership health <b>See table facilitator instructions</b>	30 min
4.	Room sharing	Ask for good ideas to share.	8 min
5.	Q & A	Ask for any questions and respond briefly	2 min
6.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	3 min

**Notes to District Presenters:**

Be sure to emphasize the importance of attracting, engaging, and retaining members.

At the wrap up, have table facilitators stand up and add “let’s thank them for their help” and lead the applause. Then have them move to the next higher number table (with highest to #1).





# **Lone Star P.E.T.S. 2020**

## **Table Facilitator Instructions**

### **Session A-3 Growing and Engaging Your Club Membership**

#### **Overview of Table Facilitator Role:**

1. Encourage participation from everyone in the group
2. Keep track of time
3. Address the questions as time permits  
(Note: We want to raise awareness and get them engaged, so mostly ask the questions, listen, and encourage the discussion. Add your own perspective as needed to stimulate discussion.)
4. Capture 1 or 2 good ideas and share briefly when called upon

#### **Table Discussion: (30 Minutes)**

1. What strategies have you experienced that better attract new members?
2. What helped you get engaged in your club?
3. Refer to p. 38-41 in LYC. What are the keys to engagement from your perspective?
4. Refer to Impact Begins With You, PETS Workbook. What can your club do differently to attract/retain Rotary members who can make an impact?
5. Refer to Rotary Harassment Policy worksheet in PETS Workbook. What can you do as club president to create a club atmosphere that is welcoming to all groups?
6. Refer to Membership Plan worksheet in Rotary Club Health Check, PETS Workbook. How could this systematic approach help your club make progress?
7. Give participants a couple of minutes to jot down ideas on the notes page at the end of this module.
8. Any questions for front of the room?



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

FRIDAY, FEBRUARY 28, 2020

### SESSION A-3

### GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

#### GOAL

Club Presidents and Presidents-elect will possess tools needed to champion effective membership development plans for their respective clubs.

#### OBJECTIVES

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

1. Share strategies and best practices to attract and engage members to improve retention
2. Describe how a club President can create a club atmosphere that is welcoming to all groups
3. List key elements of club membership health

#### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 5: Strengthening Your Membership



## MEMBERSHIP RESOURCE GUIDE

The names of hyperlinked resources appear with an underline and usually in a blue font and can be downloaded on [www.rotary.org](http://www.rotary.org) by clicking on the hyperlink.. If you experience any trouble when downloading resources, please email [membershipdevelopment@rotary.org](mailto:membershipdevelopment@rotary.org).

PUBLICATIONS		
Name	Description	Audience
<a href="#">Strengthening Your Membership</a>	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents and membership committees, and district membership chairs
<a href="#">Starting a Rotary Club</a>	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors
<a href="#">Introducing New Members to Rotary</a>	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership
<a href="#">Be A Vibrant Club</a>	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership
<a href="#">Connect for Good</a>	Eight-page guide shows how to get involved and connect with Rotary.	Current members
<a href="#">Rotary Basics</a>	This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.	New members
<a href="#">Impact Begins With You*</a>	<p>This prospective member brochure explains who we are and what sets us apart from other organizations.</p> <p>*Hard copies are available through <a href="http://shop.rotary.org">shop.rotary.org</a> until March 2020 [SKU 001]</p>	Prospective members

LEARNING CENTER: ONLINE COURSES		
Name	Description	Audience
<a href="#">Leading Change</a>	Learn the basics of change management, including how to succeed in leading change, how to assess people's readiness to make changes, how to plan for change, and how to respond to any resistance.	Rotary members
<a href="#">Rotary Basics</a>	Meet members around the world, watch videos, deepen your understanding of Rotary, and test your Rotary knowledge in this course. While designed for new members, it's a good refresher for long-time members.	Rotary members
<a href="#">Club Membership Committee Basics</a>	Learn more about your responsibilities in developing your club's strategic membership plan to attract and engage members.	Club membership committee members
<a href="#">Your Membership Plan</a>	Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant.	Rotary members
<a href="#">Best Practices for Engaging Members</a>	Is your club losing more members than it's gaining? It's time to get serious about engaging members.	Rotary members

<a href="#">Kick-start Your New Member Orientation</a>	Are new members leaving within a year or two? Learn how to better connect with them and help them get involved from the start.	Rotary members
<a href="#">Practicing Flexibility and Innovation</a>	If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them.	Rotary members
<a href="#">Building a Diverse Club</a>	A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members.	Rotary members
<a href="#">Online Membership Leads</a>	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members
<a href="#">Is Your Club Healthy?</a>	Take this course to help your club stay valuable to your members and your community.	Rotary members
<a href="#">Strategies for Attracting New Members</a>	Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors.	Rotary members
<a href="#">How to Use the Program Participants and Alumni Report Guide</a>	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership

TOOLS		
Name	Description	Audience
<a href="#">Membership Best Practices Discussion Group</a>	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members
<a href="#">Rotary Club Health Check</a>	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders
<a href="#">Membership Assessment Tools</a>	Learn how to evaluate and improve your membership development plan with these tools, complete with sample surveys and information on organizing new clubs, recruiting and retaining members.	Current members
<a href="#">Customizable Rotary Club Brochure</a>	In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials.	Prospective members
<a href="#">How to Delegate Your Online Access</a>	As a club or district officer, you can temporarily delegate your level of access in My Rotary to another member for assistance in managing Rotary business online.	Club and District leaders

RESOURCES		
Name	Description	Audience
<a href="#">Starting a Club webpage</a>	Find information and resources about the process of starting a Rotary club	Rotary members
<a href="#">Guide to Corporate Membership</a>	This guide describes the benefits of corporate membership and how to use it in your club.	Rotary members
<a href="#">Guide to Satellite Clubs</a>	This guide describes the benefits of a satellite club and how to start one.	Rotary members
<a href="#">New! Guide to Passport Clubs</a>	This guide includes information about how corporate membership works, the benefits it offers, and how clubs can get started. It also includes different models structures, a template that can be used when connecting with local businesses and organizations about this opportunity, and sample bylaws.	Rotary members
<a href="#">New! Rotary Club Models</a>	Find examples of various club types linked, model descriptions, and their target demographics	Rotary members

<a href="#">Club Membership Committee Checklist</a>	Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives.	Rotary members
<a href="#">Engaging Young Professionals Toolkit</a>	This online toolkit can help clubs connect with Young Professionals by first understanding them. Topics included are characteristics of your audience, your club's culture, ideas for outreach and engagement, and the long-term benefits of becoming a Rotarian.	Rotary members
<a href="#">Updated! State of Rotary's Membership power point</a>	Understand the current State of Rotary's Membership: how we got here, who is joining, who is leaving — and the opportunities that exist to strengthen membership.	Rotary members
<a href="#">Club Flexibility web page</a>	This web page offers ways clubs can implement the new flexible options Council decisions granted them. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members
<a href="#">“Discover Rotary” Power Point</a>	Show this presentation at prospective member or other events to introduce Rotary to the public. It covers Rotary's values, history, and the benefits of membership.	Prospective members
<a href="#">Understanding Membership Reports: Getting Started</a>	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members
<a href="#">Creating a Positive Experience for Prospective Members</a>	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members
<a href="#">Proposing New Members</a>	Best practices for proposing new members to your club.	Rotary members
<a href="#">How to Manage Membership Leads (Clubs)</a>	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders
<a href="#">How to Manage Membership Leads (Districts)</a>	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders
<a href="#">New Member Welcome Kit*</a>	<p>Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, and Proud Member window cling.</p> <p>*Hard copies are available through shop.rotary.org until March 2020 [SKU:426]</p>	New members
<a href="#">Membership Minute e-newsletter</a>	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders
<a href="#">Strategic Planning Guide</a>	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders

WEBINARS		
Name	Description	Audience
<a href="#">Courageous Leadership</a>	Using stories of transformation from Rotary and in their professional careers, hear trainers Louisa Horne and Doug Logan outline strategy for clubs on creating a vibrant membership experience. One that is irresistible to both members and visitors.	Rotary members
<a href="#">Membership Models for the Future of Rotary</a>	Associate and corporate memberships, passport, satellite, and hybrid clubs: these are just some of the innovative, flexible models that clubs have designed recently. Panelists on this webinar discuss the challenges, benefits, and lessons of designing a club experience that works for every member	Rotary members



<a href="#">Building New Clubs Together</a>	This webinar will be helpful if you believe that adding a new Rotary club in your community will broaden your capacity for service, think a satellite club may allow more prospective members to engage with Rotary, or want tips on how to charter a Rotaract club, or encourage Rotaractors to start their own clubs.	Rotary members
<a href="#">Hot, Warm, and Cold Leads: Engaging Your Prospective Members (Club Level)</a>	Rotary volunteers and staff share best practices in communicating with prospective members, ensuring their Rotary experience is positive, and managing and admitting them through the Membership Leads platform.	Club leaders
<a href="#">First Impressions Matter webinar: The Membership Experience</a>	Find out what happens when Rotarians use every interaction to engage, educate, and inspire fellow Rotarians and the community. Moderated by Jennifer Jones, Past Rotary Vice President.	Rotary members
<a href="#">How to Manage Membership Leads for District Leaders</a>	This webinar shows district leaders how to effectively utilize the Membership Leads platform, provides best practices for encouraging clubs to take action with leads, and includes a Q&A section with attendees.	District leaders
<a href="#">Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience</a>	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members
<a href="#">New! We Are Rotary: Advancing Women as Leaders</a>	Less than 25 percent of Rotary's members around the world are women, and women are underrepresented in leadership positions at every level. Watch this presentation to learn the benefits of being a diverse, equitable, and inclusive organization and the barriers that women face when they consider leadership positions.	Rotary members
<a href="#">New! State of Membership Webinar</a>	Rotary's members are our greatest assets! When our membership is strong, our clubs are more vibrant, and Rotary has greater visibility and our members have more resources to help communities flourish. Watch to see updates on how we got here, who's joining, who's leaving, and opportunities for us to all make membership a top priority.	Rotary members

TRAINING MANUALS & DOCUMENTS		
Name	Description	Audience
<a href="#">District Membership Seminar Leader's Guide</a>	This guide provides you with speaking points, PowerPoint templates, and exercises to ensure your attendees participate and are engaged in each breakout session for club leaders or members.	District leaders
<a href="#">District Membership Committee Terms &amp; Responsibilities</a>	This sheet explains the district membership committee's purpose, chair appointment, qualifications, duties, and responsibilities.	District leaders
<a href="#">Lead Your District: Committee Chair</a>	Use this manual to set up and run an effective district committee	District leaders

**Questions? Please contact Regional Membership Officer for Zones 29 and 25B**  
**Emily Tucker |Emily.Tucker@rotary.org| +1-847-866-3258**



## 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](http://www.rotary.org/join).



One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)

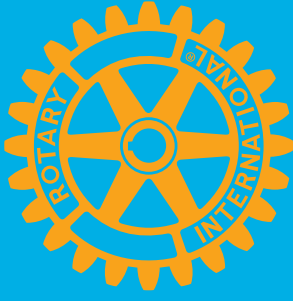
CONNECT WITH US:



001-NA-(316)



IMPACT BEGINS  
WITH YOU



# 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.



# 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.**

52



## 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 International Harassment Policy

## What is harassment?

Rotary has a harassment policy to ensure that we provide a safe, fun, and inclusive environment for all. It defines harassment as any conduct — verbal or physical — that denigrates, insults, or offends a person or group based on characteristics that include age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.

Harassment can take many forms. When a behavior becomes pervasive or extreme, it is harassment. Here are some examples:

- Using insulting words, whether spoken or written, including in email or on social media
- Bullying, including verbal or physical threats or intimidation
- Making derogatory remarks on social media or in email
- Engaging in gossip, including insulting statements about people's private lives that could damage their reputations
- Deliberately impeding a person's movements
- Asking questions or making comments about a person's sexual activity or experiences
- Making jokes or using derogatory language about someone's age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity
- Making or threatening unwelcome physical contact, such as brushing against, embracing, or pinching
- Making unsolicited comments about a person's attractiveness or appearance
- Leering or whistling
- Using, displaying, or sharing sexually suggestive or offensive words, objects, pictures, articles, letters, emails, texts, or websites
- Making references to age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity

It's important for all club and district leaders to take all allegations of harassment seriously and address the situation.

## Creating a harassment-free environment

Making sure that your club meetings and social events are free from harassment is something everyone should be a part of. The introduction to this course and the section that defines harassment discussed Rotary's commitment to preventing harassing behavior. District leaders, including governors, assistant governors, and committee chairs, must work with their clubs to maintain an environment that promotes safety, courtesy, dignity, and respect for all.

Here are some steps you can take to create a harassment-free atmosphere:

- Club leaders should discuss Rotary's policy on creating an environment free of harassment (included in its entirety at the end of this course) at a club board meeting, and determine how you want to talk about it with members.

- Talk about the policy at your club assembly. Before starting the discussion, set a list of rules that everyone agrees on to guide what could be an uncomfortable discussion. Some possible rules: talk about your own experiences and feelings, ask questions in a way to help you understand, and have only one person speak at a time.
- Club leaders should acknowledge any instances in the past that would have qualified as harassment and make it clear that such behavior will not be accepted.
- Club and district leaders should emphasize the message that Rotary will not tolerate harassment.
- Members should feel empowered to stand up to harassment when it's occurring and report it to law enforcement officials or to club or district leaders if necessary.
- Club leaders should tell members how club or district leaders will respond to reports of harassment.
- Reiterate that it is everyone's responsibility to create a harassment-free environment.

Rotary's founding ideal of bringing together leaders of different backgrounds in order to improve their communities can be accomplished only in a safe, harassment-free environment.

### **What to do if you're harassed**

- If your safety is in doubt, contact local law enforcement
- Tell someone on the club's board, a district leader, or a zone leader
- Report the incident to Rotary International
  - At a Rotary International-sponsored event like the International Assembly or the Rotary International Convention should be reported to Rotary's general secretary.
  - Any allegations of harassment by district governors, governors-elect, governors-nominee, directors, or trustees must also be reported to the general secretary. Contact your **Club and District Support** representative.
  - Other incidents should be reported to your club, district, or zone leaders. If they do not respond, notify your Club and District Support representative. They can contact the district and zone leaders for further investigation and encourage them to help resolve the issue.

**As a reminder, any allegation of harassment involving our youth must be reported to Rotary International at [youthprotection@rotary.org](mailto:youthprotection@rotary.org) within 72 hours.**

### **How to handle reports of harassment**

Allegations of harassment should be taken seriously every time.

- Acknowledge every report with respect
- Report the allegation to the appropriate person or committee
- Review the complaint and determine who to interview
- Conduct a thorough investigation
- Write a summary of the incident including any action you recommend
- Remove the accused person from youth activities
- Terminate a person's club membership

#### **Additional Resources:**

The Rotary Learning Center- Preventing and Addressing Harassment

<https://learn.rotary.org/members/learn/course/575/PreventingandAddressingHarassment>

**Rotary Code of Policies- Article 26.120. Harassment-free Environment**



# ROTARY 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.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.



## YOUR CLUB EXPERIENCE



Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary 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.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter who welcomes members to meetings.
- ☐ Our meetings are organized and run professionally.
- ☐ Members sit at different tables each week to meet and talk to different people.
- ☐ Some of the members of my club are my close friends.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.
- ☐ Our members contribute to The Rotary Foundation.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members of the club or community at least monthly.
- ☐ I have made international connections through Rotary.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

**SEE THE FOLLOWING PAGE  
FOR YOUR PROGNOSIS**





While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li>+ Change the meeting format or style. For ideas, see <b>Lead Your Club: President</b>, chapter 2, and <b>Be a Vibrant Club's</b> "Ideas to try."</li> <li>+ Find out what your members want using the <b>Member Satisfaction Survey</b> and then give them that experience.</li> <li>+ Develop leadership skills among club leaders and members by holding a <b>leadership skills training</b>.</li> </ul>
Rotary experience beyond the club	<ul style="list-style-type: none"> <li>+ Sponsor an <b>Interact</b> or <b>Rotaract</b> club, <b>organize a RYLA event</b>, <b>create a scholarship</b>, or <b>start an exchange</b>.</li> <li>+ Join a <b>Rotary Fellowship</b> or <b>Rotarian Action Group</b>.</li> <li>+ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience.</li> <li>+ Promote the work that Rotary does globally, including polio eradication, by showing a short <b>Rotary video</b> or projects on <b>Rotary Showcase</b> during a club meeting.</li> </ul>



## SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple 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.

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- ☐ Our club holds regular get-togethers (aside from club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We visit Rotary Ideas, an online project idea starter, before choosing a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input on service and social activities.
- ☐ Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.
- ☐ Our club has applied for or used Rotary grant funds for a service project.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> <li>+ Sponsor an <b>Interact</b> or <b>Rotaract</b> club, <b>organize a RYLA event</b>, <b>create a scholarship</b>, <b>start an exchange</b>, join a <b>Rotarian Action Group</b>, or <b>support the Rotary Peace Centers</b>.</li> </ul>
Quality of projects	<ul style="list-style-type: none"> <li>+ Use <b>Community Assessment Tools</b>, <b>Guide to Global Grants</b>, and <b>Rotary Ideas</b> to improve the quality of your projects.</li> </ul>
Social activities	<ul style="list-style-type: none"> <li>+ Put one or two members in charge of organizing socials throughout the year.</li> <li>+ Join a <b>Rotary Fellowship</b>.</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>+ Hold a <b>leadership training</b>.</li> </ul>

## 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.

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- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in female members in the past year.
- ☐ Our club has had a net increase in members under age 40.
- ☐ Our club seeks to recruit members from professions in the community that are underrepresented in the club.
- ☐ Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).
- ☐ Our club actively recruits Rotary alumni.
- ☐ Our club actively recruits recently retired professionals.
- ☐ Our club retains at least 90 percent of its members each year.
- ☐ At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ Our club has a process for soliciting feedback from members.
- ☐ A designated person checks and follows up on membership leads assigned to the club.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ New members are provided with an orientation and opportunities to get involved.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> <li>+ Take action to diversify your club using <b>Diversifying Your Club: A Member Diversity Assessment</b>.</li> </ul>
Professional diversity	<ul style="list-style-type: none"> <li>+ Make your club a microcosm of your community with <b>Representing Your Community's Professions: A Classification Assessment</b>.</li> </ul>
Stagnant or declining membership	<ul style="list-style-type: none"> <li>+ Create a membership development plan with <b>Strengthening Your Membership</b>.</li> <li>+ <b>Connect to Membership Leads</b> assigned to your club using <b>How to Manage Membership Leads (For Clubs)</b> and <b>resources for prospective members</b>.</li> <li>+ Target prospective members using this <b>exercise</b>.</li> <li>+ Show members how to <b>propose new members</b> to their own club and explain that they can <b>refer</b> qualified prospects to other clubs.</li> </ul>
Members leaving	<ul style="list-style-type: none"> <li>+ Start with the <b>Member Satisfaction Survey</b> to enhance current members' experience.</li> <li>+ Learn and act on trends using the <b>Retention Assessment and Analysis</b>.</li> <li>+ Use the <b>Exit Survey</b> to understand why members resign.</li> <li>+ Let resigning members know they can <b>rejoin or change clubs</b> when they are ready.</li> </ul>
Orientation and Rotary knowledge	<ul style="list-style-type: none"> <li>+ Offer <b>new member orientation, leadership development</b>, and ongoing learning opportunities with Rotary's <b>Learning Center</b>.</li> </ul>

## IMAGE



Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

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- ☐ We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.
- ☐ Our club has members dedicated to public image and outreach.
- ☐ Our club appeared in the local media multiple times last year.
- ☐ We promote our club and Rotary through various media in the community.
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's updated branding guidelines.
- ☐ We use branded materials and templates from Rotary's Brand Center.
- ☐ We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary signs and banners at our meeting place.
- ☐ Our club's presence is known in our community.
- ☐ We have a customized brochure that we give to community members and prospects.
- ☐ We use Rotary Showcase to promote our finished projects.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> <li>+ Use the resources in Rotary's <b>Media Center</b> and use them in your community's media.</li> <li>+ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's <b>Brand Center</b>.</li> </ul>
Outdated materials	<ul style="list-style-type: none"> <li>+ Find customizable club brochures and membership materials on Rotary's <b>Brand Center</b>.</li> <li>+ Follow the <b>Voice and Visual Identity Guidelines</b> in any materials your club creates.</li> <li>+ Use <b>Rotary Images</b> and <b>Rotary videos</b>, as well as images of your members, in your materials.</li> </ul>
Online presence	<ul style="list-style-type: none"> <li>+ Find a tech-savvy member to create and manage your club website and social media pages.</li> <li>+ Take the social media course in the <b>Learning Center</b>.</li> <li>+ Use <b>Rotary Images</b> and <b>Rotary videos</b>, as well as images and videos of your own members.</li> <li>+ Share your projects on <b>Rotary Showcase</b>.</li> </ul>
Marketing expertise	<ul style="list-style-type: none"> <li>+ Find tips in <b>Lead Your Club: Public Relations Committee</b> and put members with public relations expertise on the committee.</li> <li>+ Recruit professionals with marketing expertise using ideas from <b>Finding New Club Members: A Prospective Member Exercise</b>.</li> <li>+ Build your own social media expertise using the Social Media Toolkit in Rotary's <b>Brand Center</b>.</li> </ul>

## BUSINESS AND OPERATIONS



When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

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- ☐ We have a strategic plan for our club that we update regularly.
- ☐ We have annual goals and enter them in Rotary Club Central.
- ☐ Our club has committees that support the activities and regularly report to the club board on progress toward goals.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends PETS, and club leaders attend the district training assembly.
- ☐ Members attend district events and seminars on Rotary topics that interest them.
- ☐ New members are officially inducted and are presented with appropriate materials.
- ☐ At least half of our club's members have a My Rotary account.
- ☐ Club officers conduct Rotary business using My Rotary or integrated club software.
- ☐ 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.
- ☐ We offer ongoing learning opportunities for our members.



Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of 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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> <li>+ Create a vision for your club and set long-range and annual goals using the <b>Strategic Planning Guide</b>.</li> <li>+ Track your annual goals in <b>Rotary Club Central</b>.</li> <li>+ Use <b>Strengthening Your Membership</b> to make a membership development plan.</li> </ul>
Innovation	<ul style="list-style-type: none"> <li>+ Ask members for input using the <b>Member Satisfaction Survey</b>, and try their ideas. If they're successful, edit your club bylaws accordingly.</li> <li>+ Use templates in the <b>Brand Center</b> to create your own materials.</li> </ul>
Processes	<ul style="list-style-type: none"> <li>+ Develop standard processes for <b>new members, prospective member follow-up, proposing a new member</b>, leadership continuity, etc.</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>+ Find tips and resources in Lead Your Club: <b>President, Secretary, and Treasurer</b>.</li> <li>+ Offer leadership development opportunities and promote self-paced learning with Rotary's <b>Learning Center</b>.</li> </ul>
Managing funds	<ul style="list-style-type: none"> <li>+ Use <b>The Rotary Foundation Reference Guide</b> to learn about giving options.</li> <li>+ Find best practices in <b>Lead Your Club: Treasurer</b>.</li> </ul>
Managing your club on MyRotary	<ul style="list-style-type: none"> <li>+ Use the <b>Club Administration</b> section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.</li> </ul>



## WHAT'S NEXT?



Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check 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, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

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### FEATURED RESOURCES

#### Membership Assessment Tools

#### Membership resources

#### Brand Center

#### Learning Center

#### Rotary videos



# YOUR MEMBERSHIP PLAN WORKSHEET

Use this worksheet to make a membership plan for your club. After evaluating your club, focus on the particular steps that address your club's toughest challenges. The steps will direct you to resources that can help. When you've completed the steps, you will have identified challenges and opportunities, developed a vision, and generated strategies for prospective, new, and established members.

During club meetings, talk to members about the steps you're taking to strengthen membership, and encourage those members to get involved in the process.



## Step 1: Evaluating Your Club

- ☐ We identified areas for improvement after using the [Rotary Club Health Check](#), and we took the course [Is Your Club Healthy?](#) in the [Learning Center](#) to review the modules that address the areas of our club that need attention. Based on what we learned, we will try the following:

Area for improvement

Remedy we plan to try

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- ☐ We found ideas or best practices in [Be a Vibrant Club](#) that we will use to make our club innovative and flexible:

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- ☐ We completed the membership [diversity assessment](#), have taken the course [Building a Diverse Club](#) in the [Learning Center](#), and plan to do the following to increase and celebrate new ideas and perspectives:

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- ☐ Our club completed the [classification assessment](#) and plans to do the following to better represent our community's professional diversity:

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## Step 2: Creating a Vision for Your Club

- ☐ Our club completed the club visioning process and developed the following vision:

In 3-5 years, our club will:

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- ☐ Our club has a membership committee with a leader and at least five members to guide the implementation of our vision and membership plan.

- ☐ Long-term goals that will help us achieve our vision include:

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- ☐ We reviewed our club's strategic plan to ensure that our membership plan aligns with it.

## Step 3: Attracting New Members

- ☐ Our club completed the course **Strategies for Attracting New Members** in the [Learning Center](#) and plans to make itself more attractive to prospective members in the following ways:

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- ☐ Our club completed the [Finding New Club Members exercise](#) and will take these actions to find prospective members:

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- ☐ Our club selected the following membership benefits to highlight when speaking to prospective members:

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- ☐ Our club took the course **Practicing Flexibility and Innovation** in the [Learning Center](#) to understand the flexible options now available to clubs, and we plan to try the following to better accommodate members:

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- ☐ Our club took the **Online Membership Leads** course in the [Learning Center](#), and we understand how membership leads can benefit our club.

☐ Our club leaders have determined who will manage membership leads assigned to our club.

☐ Our club has a process for following up with prospective members assigned to us through the membership leads program.

- ☐ Our club has read [Creating a Positive Experience for Prospective Members](#), understands how that experience can influence prospective members' perceptions of Rotary, and has a plan to ensure we create a good experience for prospects whether or not they join.

#### **Step 4: Engaging Your Club's Members**

- ☐ Our club has asked members to complete the [member satisfaction survey](#) and decided to implement the following changes based on the results:

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- ☐ Our membership committee members have taken the course **Kick-start Your New Member Orientation** in the [Learning Center](#), have read [Introducing New Members to Rotary](#), and are developing an orientation process that educates new members and involves them in the club. Our orientation process will include the following:

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- ☐ Our club completed the [retention assessment and analysis](#), discussed the results, and will take these steps to improve our engagement and retention:

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- ☐ Our club has taken the course **Best Practices for Engaging Members** in the [Learning Center](#) and will take these actions to engage our members:

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- ☐ Our club has looked at the many ways members can get involved through Rotary, as outlined in [Connect for Good](#), and will encourage members to get involved in these new ways:

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- ☐ Our club asked members who've left recently to complete the [exit survey](#) to better understand why members leave the club. We've discussed the results and will take these steps to engage the member groups we've identified as the most vulnerable to termination:

Member groups

Strategy

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## Step 5: Improving Your Public Image

- ☐ We have selected a club member to manage our social media content.
- ☐ We have selected a member to manage and update our club website using materials from Rotary's [Brand Center](#).
- ☐ We have selected a member to update our customizable club brochure using the template on Rotary's [Brand Center](#).
- ☐ We visited the [Brand Center](#) on My Rotary and will use these additional tools to promote awareness in our community:

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- ☐ Our club hosted a focus group in our community. The group yielded these findings:

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## Step 6: Supporting New Clubs

- ☐ Our club membership committee chair has told our district governor that we're willing to serve as a sponsor club.
- ☐ Our club members have discussed the responsibilities of serving as a sponsor club and agree to commit to this relationship.
- ☐ Our club leaders are open to supporting a satellite club and consider it as an option for accommodating differing needs among members.

## Step 7: Supporting Your Club: Rotary Resources and Tools

- ☐ Our club membership committee communicates regularly with our district membership committee.
- ☐ Our club leaders regularly communicate with our district governor or assistant governor and ask for help when we need it.
- ☐ Our club membership committee members have visited [rotary.org/membership](https://rotary.org/membership) within the past month and know where to find Rotary materials to help our club.

[illegible]

District Delivery: Session A-4 **Increasing Humanitarian Service by Supporting Our Foundation** (One hour)

	Step?	We want to accomplish?	How long?
1.	Introduce topic and presenter(s)	Direct attention to the PETS Workbook, Tab 4: Increasing Humanitarian Service by supporting our Foundation  Refer to the three learning objectives Introduce presenter(s)	2 min.
2.	Front of room	Presentation of key content (PPT can serve as outline and a handout for notes) Address why it is important to establish priorities and goals for TRF giving in their club	15 min
3.	Table Discussion	1st Learning Objective: Explain how support for the Rotary Foundation can help increase humanitarian service  2nd Learning Objective: Explain how participation in programs of the Rotary Foundation helps attract and retain members  3rd Learning Objective: Identify the good works accomplished through our Foundation  4th Learning Objective: Identify types of individual and club recognitions for giving to our Foundation  <b>See table facilitator instructions</b>	30 min
4.	Room sharing	Ask for good ideas to share.	6 min
5.	Q & A	Ask for any questions and respond briefly	3 min
6.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to schedule of evening program and events. (Tell them you are looking forward to meeting with them on Sunday morning for grant management training.)	4 min

**Notes to District Presenters:**

A great opportunity for each DGE to highlight how the district plans to support clubs to increase humanitarian service and outline seminars/trainings that will be held within the district for the “nuts and bolts” The intent of this session is for the PE to understand how leading their club and club members in support of the Foundation can increase humanitarian service and help attract and retain members. . . it is NOT a mini grants seminar or Foundation seminar, although some attention has to be given to the basics of the Foundation for PEs to understand why support is valuable.





# **Lone Star P.E.T.S. 2020**

## **Table Facilitator Instructions**

### **Session A-4 Increasing Humanitarian Service By Supporting Our Foundation**

#### **Overview of Table Facilitator Role:**

1. Encourage participation from everyone in group
2. Keep track of time
3. Address the questions as time permits

(Note: Add your own perspective if needed to stimulate discussion. We want to raise awareness and get them engaged, so mostly ask the questions, listen, and encourage the discussion)

4. **Capture 1 or 2 good ideas and share briefly when called upon**

#### **Table Discussion: (30 Minutes)**

1. How does support for The Rotary Foundation help increase humanitarian service?
2. What are some of the programs of The Rotary Foundation?
3. How does participation in Rotary Foundation programs help attract, engage, and retain members?
4. What are some of the good works accomplished through our Foundation? Refer to the Rotary Areas of Focus in your PETS Workbook.
5. What are some of the types of individual and club recognitions for giving to our Foundation? For example, Sustaining Member, Paul Harris Fellow, Paul Harris Society, etc. Refer to the Individual and Club Recognitions handout in your PETS Workbook.
6. Refer to Chapter 7 of LYC and give participants time to jot down ideas on the notes page at the end of this module.
7. Any questions for front of the room?

**Tell your PEs:**

This concludes the Friday sessions with our District.

Saturday morning you will go to your assigned breakout room after breakfast. The breakout groups are organized by similar clubs, so you will be with peers from throughout the ten Districts attending Lone Star PETS. You will be with that same group for the Saturday sessions.



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

FRIDAY, FEBRUARY 28, 2020

### SESSION A-4 INCREASING HUMANITARIAN SERVICE BY SUPPORTING OUR FOUNDATION

#### GOAL

**Club Presidents and Presidents-elect will possess tools necessary to increase humanitarian service accomplished by their clubs by developing club member support for The Rotary Foundation.**

#### OBJECTIVES

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

1. Explain how support for the Rotary Foundation can help increase humanitarian service
2. Explain how participation in programs of the Rotary Foundation help attract, engage, and retain members
3. Identify the good works accomplished through our Foundation
4. Identify types of individual and club recognitions for giving to our Foundation

#### REFERENCE MATERIALS

Lead Your Club: President - Chapter 7: The Rotary Foundation





# ROTARY'S AREAS OF FOCUS







The work of Rotary begins in the community, and every community has its own unique needs and concerns. While we serve in countless ways, we've focused our efforts in six key areas to maximize our impact. These areas encompass some of the world's most critical and widespread humanitarian needs, and we have a proven record of success in addressing them:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development



Rotary members planning new service projects are encouraged to consider these areas and the many opportunities for innovative projects within them. This publication introduces each area and suggests how Rotary clubs and districts and their service partners can address these needs both locally and internationally.

## ROTARY FOUNDATION GLOBAL GRANTS AND THE AREAS OF FOCUS

All Rotary clubs and districts are eligible to apply for global grants from The Rotary Foundation to support sustainable activities with high-impact outcomes in one or more of the six areas of focus. These activities may include humanitarian projects, scholarships, and vocational training teams. Prospective global grant-funded projects should include a plan for monitoring and evaluation using the measures established by the Foundation for each area. Learn about the criteria for global grants in each area by consulting the Areas of Focus Policy Statements at [Rotary.org](http://Rotary.org).

## ROTARY SHOWCASE

Interested in seeing how other clubs are making an impact in Rotary's areas of focus? Check out Rotary Showcase ([www.rotary.org/showcase](http://www.rotary.org/showcase)), a tool that lets you view, share, and publicize Rotary service projects. Find inspiration from other clubs' success stories and add your own project to show the world how your club is making a difference.



## PEACE AND CONFLICT PREVENTION/RESOLUTION

### RESPONDING TO CONFLICT

**20,000 people**

are maimed or killed by land mines each year.

TAKE ACTION

Identify triggering or accelerating factors in the conflict and work to mitigate them.



TAKE ACTION  
Offer support to marginalized groups that are at risk of violence or persecution.

**51 million people**

are currently displaced by armed conflict or persecution.

TAKE ACTION

Provide relief to those who have fled areas of conflict.

#### TIPS FOR SUCCESS

- 1 Plan projects to engage all community stakeholders, including women, marginalized populations such as ethnic or religious minorities, and opposing sides in conflicts.
- 2 Understand and respect the laws and customs of all the communities you serve.

TAKE ACTION

Help children who have been orphaned, injured, or traumatized by conflict.

**90% of casualties**

in armed conflicts are civilians, at least half are children.



# PREVENTING CONFLICT/BUILDING PEACE

## 300,000 child soldiers

(boys and girls under age 18) are believed to be involved in conflicts around the world.

### TIPS FOR SUCCESS

- 1 Use role-playing and sports to teach children and young adults socially appropriate ways of dealing with conflict.
- 2 As a component of service projects, train community leaders in strategies to prevent and mediate conflict, such as facilitating community dialogue and initiating alternative dispute resolution.
- 3 Partner with Rotary Peace Fellows and other conflict-prevention experts and organizations.

### TAKE ACTION

**Incorporate conflict resolution and mediation strategies into service projects** involving local schools, orphanages, workplaces, and community centers.

### TAKE ACTION

**Recruit candidates for a Rotary Peace Fellowship.** Up to 100 peace fellowships are offered annually at Rotary Peace Centers at universities around the world.

### TAKE ACTION

**Participate in fellowship and service activities** with Rotary clubs in other parts of the world to promote understanding and peace.

### TAKE ACTION

Pursue projects that **address the underlying causes of conflict**, including poverty, inequality, ethnic tensions, lack of access to education, and unequal distribution of resources.



## DISEASE PREVENTION AND TREATMENT

### DISEASE PREVENTION

# 1 billion people

suffer from neglected tropical diseases such as dengue fever and leprosy each year.

#### TIPS FOR SUCCESS

- 1 Consult with Rotary members who have medical or public health expertise.
- 2 Communicate with local and regional hospitals, clinics, universities, and ministries of health to avoid duplicating efforts and to take advantage of local resources.
- 3 Enlist community workers and health and medical volunteers to perform immunizations.
- 4 Partner with successful community-based health care organizations to strengthen and expand existing services.

#### TAKE ACTION

**Support health education programs** that explain how diseases are spread, and promote ways to reduce the risk of transmission.

#### TAKE ACTION

**Help immunize people** against infectious diseases.



## HEALTH CARE

### 2.4 million doctors,

nurses, midwives, and other skilled caregivers are needed worldwide.

### 57 countries

have fewer than 23 health workers for every 10,000 people.

#### TIPS FOR SUCCESS

- 1 Work with local health centers to develop programs that attract health workers with a variety of skills. A shortage in a particular skill area can burden health center staff and limit the care available.
- 2 Ensure that training facilities are located where the workforce lives and works in order to improve retention rates.

#### TAKE ACTION

**Support continuing education and training** for health workers through scholarships, stipends, and public recognition.

### 100 million people

are pushed into poverty each year by medical costs.

### 1 in 6 people

worldwide cannot pay for health care.

#### TIPS FOR SUCCESS

- 1 Focus on providing long-term support for community health centers.
- 2 Partner with global health systems to increase access to equipment, facilities, and the latest health care programs.
- 3 Incorporate innovative technologies such as mHealth, which can be accessed on mobile wireless devices, to extend the reach of health centers.

#### TAKE ACTION

#### Improve and expand access

to low-cost and free health care in underserved areas.





## WATER AND SANITATION

### SANITATION AND HYGIENE

**2.5 billion people**

lack access to improved sanitation.

#### TAKE ACTION

**Improve sanitation facilities** by

providing toilets and latrines that flush into a sewer or safe enclosure.

**1,400 children**

die each day from diseases caused by lack of sanitation and unsafe water.

#### TIPS FOR SUCCESS

- 1 Avoid prescribing a solution for a community. Instead, work with the community to determine what is most appropriate.
- 2 Remember sanitation and hygiene: Very few people die from thirst; millions die from preventable waterborne diseases.



#### TAKE ACTION

**Promote good hygiene habits**

through education. Proper hand washing with soap and water can reduce diarrhea cases by up to 35 percent.



# IMPROVE WATER QUALITY AND ACCESS TO WATER



## TAKE ACTION

### Build wells

to extract groundwater from underground aquifers.

## 6 hours

per day is what women in some rural parts of Africa spend collecting water from a remote source.

## TAKE ACTION

**Promote low-cost solutions**, such as chlorine tablets or plastic bottles that can be exposed to sunlight, to improve water quality.

## 748 million people

don't have clean drinking water.

## TIPS FOR SUCCESS

- 1 Work with the community to establish a water committee and a fee system to allow for ongoing operation and maintenance of the water system.
- 2 Before digging or drilling a new well, plan carefully to ensure that the water will be safe and the well is environmentally sustainable.
- 3 Utilize government-approved technology and equipment so that spare parts and repair work will be readily available.

## TAKE ACTION

**Implement rainwater harvesting** systems to collect and store rainwater for drinking or recharging underground aquifers.

## TAKE ACTION

**Provide home water treatment capability**, through the use of filters, solar disinfection, or flocculants, to make drinking water safe.







## MATERNAL AND CHILD HEALTH

### CHILD HEALTH CARE



#### TAKE ACTION

Develop or support programs that **provide immunizations and antibiotics**. Measles, malaria, pneumonia, AIDS, and diarrheal diseases are the leading causes of death in children under five.

## 6.3 million children

**under the age of five die each year from diseases, malnutrition, poor health care, and inadequate sanitation.**

#### TAKE ACTION

**Prevent mother-to-infant HIV transmission** by encouraging the use of antiretroviral drugs and formula feeding.



#### TAKE ACTION

**Include water, sanitation, and hygiene efforts** to maximize child nutrition. Diarrheal diseases caused by contaminated water exacerbate malnutrition in children.



#### TAKE ACTION

**Promote good nutrition**, including encouraging breastfeeding for most infants.



## REPRODUCTIVE HEALTH

**222 million women**

who would prefer to delay or avoid childbearing lack access to safe and effective contraception.

### TAKE ACTION

**Provide information about — and access to — contraceptives.** Just filling the unmet need for contraception could reduce the number of maternal deaths by nearly one-third.

### TIP FOR SUCCESS

Take time to understand prospective beneficiaries' beliefs surrounding contraception and foster an environment of open, nonjudgmental communication to build good working relationships in the community.

## ANTENATAL CARE AND CHILDBIRTH

### TAKE ACTION

**Provide birthing kits** to health professionals.



Women in sub-Saharan Africa face a

**1 in 39 lifetime risk**

of dying of pregnancy- or childbirth-related complications.

**80% of maternal deaths**

could be prevented with access to reproductive health services and trained health care workers.

### TAKE ACTION

**Support accredited training programs** for health professionals.

### TIPS FOR SUCCESS

- 1 Ensure sustainability by empowering the local community to take ownership of health training programs.
- 2 Consult Rotary members who are trained in maternal and newborn health care, such as midwives, obstetricians, and gynecologists.
- 3 Partner with local organizations that have expertise in maternal and child health.







## BASIC EDUCATION AND LITERACY

### TEACHER TRAINING

**1.7 million additional teachers**

are needed worldwide to meet the goal of universal primary education.

#### TIPS FOR SUCCESS

- 1 Develop long-term relationships with teachers to ensure that they have access to the latest training and materials.
- 2 Consult with education officials to design teacher training programs and curriculums.

TAKE ACTION

**Provide teacher training** and needed classroom supplies.

TAKE ACTION

**Send a vocational training team** to offer curriculum development training in rural communities.





# SUPPORTING STUDENTS

## TAKE ACTION

### Volunteer

in a classroom  
or after-school  
program.



## 57 million children

worldwide are not in school.

## TAKE ACTION

### Support concentrated language encounter

(CLE) literacy programs. These low-cost text- or activity-based immersion programs can be effective with adults as well as children.

## TAKE ACTION

### Develop an adult literacy program.

## 781 million people

over the age of 15 —  
60 percent of them women —  
are illiterate.

## TAKE ACTION

### Serve as a mentor to students in your community.



## TAKE ACTION

### Promote student enrollment and prevent health-related absences by sponsoring school meal programs and providing safe drinking water and sanitation facilities.



## TIPS FOR SUCCESS

- 1 Remove barriers to girls' education caused by cultural attitudes, safety concerns, and the need for girls to contribute to the household economy. Gender equality is vital to sustainable community development.
- 2 Involve students, parents, teachers, and administrators to gain support for your endeavors.
- 3 Partner with local organizations that can offer advice and resources to help you organize a CLE program.



## ECONOMIC AND COMMUNITY DEVELOPMENT

### INCOME GENERATION AND SAVINGS

**190 million people**

are funding their business endeavors through microfinance.

TAKE ACTION

#### **Partner with a local microlender**

to improve access to financial services and provide financial infrastructure in the community.

TAKE ACTION

#### **Develop mobile banking resources**

in partnership with a microlender. Cell phones, which can be used to make deposits and transfer funds, can increase access to banking systems in developing communities.

#### **TIPS FOR SUCCESS**

- 1** When supporting service projects in a developing community, purchase goods and supplies locally to stimulate the economy and avoid unnecessary shipping fees.
- 2** Establish a Rotary Community Corps (RCC) and empower members to take action. RCC members are in a unique position to identify barriers to the community's economic progress and develop sustainable solutions.



# JOB CREATION AND ENTREPRENEURSHIP



## TAKE ACTION

### Expand vocational training

opportunities, including job placement programming, at local nonprofit organizations.

## TIP FOR SUCCESS

Support entrepreneurs and small businesses in developing communities. The success of local business leaders can multiply employment opportunities in the community.

## TAKE ACTION

**Partner with a cooperative** that provides training, joint economic ventures, and ownership of assets to its members through a democratic structure.

# 1.4 billion people

— nearly half of them employed —  
live on less than \$1.25 a day.

## TAKE ACTION

### Send a vocational training team

to teach business leaders in developing communities how to create a business plan and maintain accurate financial accounting.

## TAKE ACTION

### Provide equipment or supplies

to a cooperative to increase production and sales in the local market.







## ADDITIONAL RESOURCES

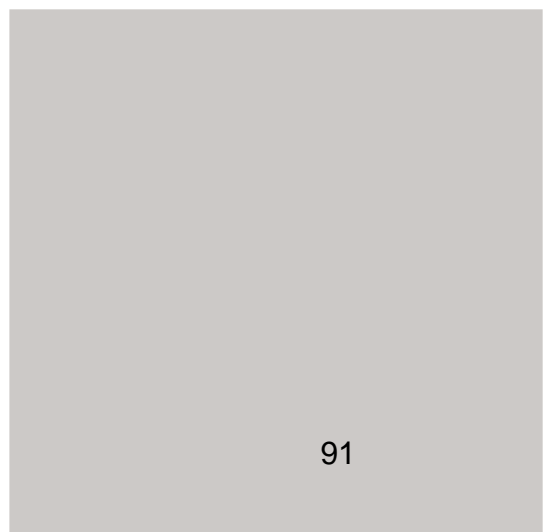
Consult the Lifecycle of a Project resources at [Rotary.org](http://Rotary.org) for information about conducting a service project, including community assessments, collaborating with others, sustainability strategies, and evaluation methods.



Rotary International  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA

[www.rotary.org](http://www.rotary.org)

965-EN—(515)



## Individual recognition

### Rotary Foundation Sustaining Member

When you give \$100 or more per year to the Annual Fund.

### Benefactor

When you include the [Endowment Fund](#) as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.

### Paul Harris Fellow

When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. Learn more about [Paul Harris Fellow recognition](#).

### Multiple Paul Harris Fellow

When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

### Paul Harris Society member

When you elect to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant. Learn more about the [Paul Harris Society](#).

### Bequest Society

When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.

- \$10,000: Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000: Rotary's Promise crystal and named endowed fund, plus all of the above
- \$50,000: Separate named endowed funds directed to two areas of focus or districts, plus all of the above
- \$100,000: Customized Rotary's Promise crystal, plus all of the above

- \$250,000: Posthumous induction into the Arch Klumph Society, plus all of the above
- \$500,000: Special seating and registration benefits at the Rotary International Convention, plus all of the above

## Major Donor

When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant.

NOTE: Name recognition is not automatic and needs to be reported to [RI staff](#).

Recognition items commemorate giving at these levels:

- Level 1: \$10,000 to \$24,999
- Level 2: \$25,000 to \$49,999
- Level 3: \$50,000 to \$99,999
- Level 4: \$100,000 to \$249,999

## Arch Klumph Society

When your cumulative donations reach \$250,000. Recognition includes an induction ceremony and your picture and biography in the Arch Klumph Society interactive gallery at the Rotary International headquarters in Evanston, Illinois, USA. You also receive invitations to society events, along with membership pins and crystals that commemorate giving at the following levels. Learn more about the [Arch Klumph Society](#).

- Trustees Circle: \$250,000 to \$499,999
- Chair's Circle: \$500,000 to \$999,999
- Foundation Circle: \$1,000,000 to \$2,499,999
- Platinum Trustees Circle: \$2,500,000 to \$4,999,999
- Platinum Chair's Circle: \$5,000,000 to \$9,999,999
- Platinum Foundation Circle: \$10,000,000 and above

## Legacy Society

When you promise a gift of \$1 million or more to the Endowment, you'll be listed in Rotary's annual report and invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special recognition items and all the benefits provided to Bequest Society members.

## Club recognition

### 100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

### 100% Paul Harris Society Club

For clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus, or global grants within a Rotary year

### 100% Foundation Giving Club

For clubs that achieve an average of \$100 in per capita giving and 100 percent participation, with every dues-paying member contributing at least \$25 to any or all of the following during the Rotary year: Annual Fund, PolioPlus Fund, approved global grants, or [Endowment Fund](#).

### 100% Rotary's Promise Club

For clubs in which every dues-paying member supports the Endowment. The commitment may be for a future gift to The Rotary Foundation in an estate plan or an outright gift of \$1,000 or more to the Endowment.

### Every Rotarian, Every Year Club

For clubs that achieve a minimum Annual Fund contribution of \$100 per capita during the Rotary year, and every dues-paying member must personally contribute at least \$25 to the Annual Fund during the year.

### Top Three Per Capita in Annual Fund Giving

For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

[illegible]





This concludes the four Friday sessions within your District.

Saturday morning you will go to your assigned breakout room.

The breakout groups are organized by similar clubs, so you will be with peers from throughout the ten Districts attending Lone Star P.E.T.S..

You will be in that same room for the day.



# **SATURDAY SESSIONS**



## Session B-5 Reaching Out Through Service (One hour)

	Step?	We want to accomplish?	How long?
1.	Welcome & Overview	Briefly introduce yourself and the 2nd facilitator. Tell them you will lead the 1 <sup>st</sup> two sessions; the other facilitator will lead the 2 <sup>nd</sup> two; and the last two will be split. Introduce room host (if room has one) Provide overview for this first breakout session. Grouped by similar clubs. Participants and facilitators/room host will stay together throughout today.	3 min.
2.	Introductions Ice-Breaker	Getting participants engaged: Have participants pair up. If odd #, ask room host/facilitator to participate.  You will introduce your partner to the class. Besides name and club, get answers to these three questions: 1) Where were you born? 2) What is your favorite time of day and why? 3) What's the most important characteristic for a Rotary leader?  Give them four minutes to interview each other (2 minutes apiece). At four minutes, ask the pairs to wrap up. When everyone is ready, ask "who would like to go first?" Ask the 1 <sup>st</sup> pair to come up front and introduce each other. When they finish, lead the applause. Then ask for "next?" and chose from different parts of the U (avoid just going around the U in order). Continue until everyone has been introduced, then ask "what did we discover from this process? Did it get noisy in the room? Why didn't the noise bother you? How did it feel to be introduced (in the spotlight)?" Wrap up with: "Good leaders put the spotlight on others rather than themselves."	20 min
3.	Tab B-5	Provide topic – have participants open Workbook to B-5 Reaching Out Through Service	1 min
4.	1st Learning Objective	Articulate the value of building a balanced program of local community and international service projects, based on club membership interests  Facilitate classroom discussion: What is the value of local service projects? What is the value of international service projects? What is the correct percentage mix between the two? (There is no right answer) How would you decide the right mix for your club?	10 min
5.	2nd Learning Objective	Define key elements of an effective project Refer to What makes a service project effective? in the PE Workbook p. 70 Facilitate class discussion: What elements make up an effective project? Which element is most important? Which element(s) in your club's projects needs your leadership?	10 min
6.	3rd Learning Objective	Identify key club members who have leadership and passion for various projects  Facilitate classroom discussion: What is a key service project in your club? Who would make a good service chair? How do you discover who has leadership and passion for service projects?	10 min
7.	Q & A	Ask for any questions and respond briefly	3 min
8.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	4 min



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

SATURDAY, FEBRUARY 29, 2020

### SESSION B-5 REACHING OUT THROUGH SERVICE

#### GOAL

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

#### OBJECTIVES

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

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

#### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 8: Your Projects





# CONDUCTING SERVICE PROJECTS



Your committee's role is **to lead your club's projects** to make a difference in the communities you work in. Club projects also provide an opportunity for your club members to network and socialize with each other, which can help strengthen their commitment to Rotary.

For each project, your committee will develop a timeline, conduct a community assessment, and establish criteria for measuring progress, using the resources and tools available to you. Here is one process your club can use for planning and implementing a Rotary service project:

- 1. Assess the situation.**

Successful service projects address real and current concerns within a community and use the assets of that community to make a lasting change. Conduct an assessment to identify a community's assets and needs. The [Community Assessment Tools](#) guide gives you a variety of community assessment methods you can use. You must include community assessment results with applications for a global grant.

- 2. Choose a project.**

The assessment provides criteria for choosing a service project. Some criteria to consider include **community support and involvement, the club's history of service, the resources available to you, the length of the project, and the project's sustainability.**

- 3. Make a plan.**

Set objectives, develop a work plan and a budget, and determine what liability protection is called for. After you choose a project, work with your **club's** board and district staff to discuss funding and other resources that can help you develop detailed plans for your project. Contact your [district international service chair](#) to connect with local experts within the family of Rotary.

- 4. Carry out your project.**

Promote the project, raise funds, and manage project activities.

- 5. Evaluate your project.**

Determine what worked and what didn't. Document your findings and incorporate them into your club's project planning process.

Need help getting started?

- The [Rotary's Areas of Focus](#) guide provides examples of projects in each area.
- The Rotary's Areas of Focus course on the [Learning Center](#) has presentations to help educate members on our different causes.

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

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

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

## CONTACTING OTHER ROTARY CLUBS

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

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

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

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

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

# SUSTAINABILITY

For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after the grant funding ends.



## Start with the community

Identify a need and develop a solution that builds on community strengths and aligns with local values and culture.



## Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



## Provide training

A project's success depends on people.



## Buy local

Purchase equipment and technology from local sources.



## Find local funding

Get local funding through governments, hospitals, companies, and other organizations.



## Measure your success

Develop clear and measurable project outcomes and determine how you will collect your data.



## What makes a service project effective?

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

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

# RECOMMENDED STAKEHOLDERS FOR ROTARY'S AREAS OF FOCUS

## Peace and conflict prevention/ resolution

- Victims of violence, refugees, or internally displaced people
- Perpetrators of violence
- Factions that are at odds with each other
- Civil society organizations
- Schools and educational institutions
- Local government and law enforcement authorities

When you're assessing sensitive populations such as trauma victims or communities in conflict, it is crucial that you work directly with individuals or organizations that understand the dynamics of the situation. These collaborations will ensure that the assessments are conducted appropriately, with the best possible outcome.

## Water and sanitation

- Community leaders, particularly women
- Ministries of water, sanitation, or environment
- Ministries of education, along with students, teachers, headmasters, and parent associates (WASH in Schools)
- Ministries of health (WASH in health care facilities)
- District/local government representatives
- Private utility companies
- Service providers (hand pump mechanics, community outreach workers, etc.)

- Farmers (irrigation)
- WASH advocacy associations
- WASH organizations working in the area

## Basic education and literacy

- Teachers
- Parents
- Students
- Youth who do not attend school
- School administrators
- School management committees
- Ministries of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries and librarians

## Disease prevention and treatment & maternal and child health

- Individual health care recipients:
  - Pregnant women
  - At-risk children
  - Adults at risk for noncommunicable and communicable diseases
  - At-risk aging population
- Community health centers and hospitals
- Mobile outreach systems
- Community health care workers
- Skilled birth attendants
- Health care professionals (nurses, doctors, midwives, technicians, specialists, etc.)

- Access and continuum of care structures:
  - Prevention, primary care, and referral systems
  - Transportation providers
  - Hospitals
  - Follow-up and rehabilitation services
  - Chronic care support and palliative/hospice care systems

## Economic and community development

- Local government authorities
- Women's groups
- Government extension services
- Job research centers
- Entrepreneurs
- Ministries of trade, agriculture, social services, women's empowerment, and vocational services
- Farmers
- Unemployed youth and adults
- Business owners
- Banks
- Cooperatives (agricultural, savings and loan, etc.)
- Microfinance institutions
- Vocational training institutions
- Community colleges
- Secondary schools
- Universities
- Adult education organizations

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111





# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

SATURDAY, FEBRUARY 29, 2020

### SESSION B-6

### FUNDRAISING THAT WORKS

#### GOAL

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

#### OBJECTIVES

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

1. Identify purposes for fundraising
2. Identify the role of club President in club fundraising
3. Evaluate fundraising options in light of perceived club culture

#### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 2: Leading Rotarians



# PLANNING FUNDRAISING EVENTS



Work with your club committees on fundraising efforts. A successful fundraising event **can support projects that make a real difference in people's lives. If your club chooses to** organize a fundraiser, include the following steps:

1. **Determine what you need.** Set a target amount as your goal and identify the type of event that will realistically yield that amount.
2. **Establish a budget.** Find out what is available in your club budget to hold an event and determine what your expenses and anticipated revenues will be.
3. **Identify the resources required to meet your fundraising goals.** Determine how many people are needed to plan and carry out the fundraiser. Use [Rotary Ideas](#) to help you plan your event and meet your fundraising goals.
4. **Figure out logistics.** Choose an appropriate date and venue for the event.
5. **Minimize risks.** Evaluate whether the event activities might lead to potential losses to the club, and determine how those losses can be avoided.
6. **Organize volunteers.** Determine roles and tasks for volunteers, and involve community members. Set up a fundraising organizing committee.
7. **Publicize the event.** Work with the club public image committee to identify target audiences for your event in the club and the community, and plan how you will reach them. Notify the media about your event if appropriate. You will find a variety of promotional resources in the [Brand Center](#).
8. **Hold the fundraiser.** Encourage volunteers to monitor the event's progress, noting successes and challenges to be discussed during evaluation.
9. **Manage funds appropriately.** Establish a tracking procedure before collecting any funds, and deposit funds in an account opened specifically for the event. Report how the funds are used to the club and donors.
10. **Recognize volunteers, contributors, and sponsors.** Send personalized thank-you notes, photos, and certificates if appropriate.
11. **Evaluate the effort.** Make note of what worked and what **didn't** so what you learned can be applied to future fundraisers.
12. **Ensure success for future fundraising efforts.** Discuss any outstanding concerns or issues with the incoming treasurer and with new members of the fundraising organizing committee.

You will find more event ideas and promotional resources in the [Event Planning Guide](#) in the Rotary Brand Center.

## *What Is Your Club Known For?*

One of my most favorite Rotary activities is to visit clubs that are new to me. I frequently walk in, introduce myself to a member, and ask them to tell me about one of their club's projects.

All too frequently, what follows is a description of the club's Auction or Golf Tourney or Pizza Bowl — a fundraiser, but not a service project — which is, after all, the reason Rotary exists.

If club members, when asked to share something about their club, immediately focus on how the club raises money and ignore the service aspects of what we do, how is Rotary to share the good word of our successes? How are we to engage potential members if we stress the *how* of what we do, but not the *why* or the *what*?

Rotary leadership training programs often describe the importance of the "elevator speech," the opportunity to condense the essence of our Rotary experience into a few sound bites when we have an opportunity to explain Rotary to a stranger.

As leaders in this movement, it is critical that we spread the word to club members that, when given the opportunity to talk about Rotary, they should be sure to include how their local club supports a scholarship fund or food pantry or home heating oil fund. How Rotary is ridding the world of a crippling disease. How Rotary is making a difference on the ground through our humanitarian grants.

And only when the follow-up question comes, "how do Rotary members find the money to do all this?" should we talk about the Wine Auction or the Polar Bear Plunge.

—Marty Helman

## *Public Image*



## Signature Projects Deliver Significant Benefits

*By Rotary Zone Coordinator Gayle Knepper*

Many clubs are looking for ways to become involved in a new area of service — in other words, a new project — to meet changing needs of their communities, re-motivate members and stimulate involvement from non-Rotarians. If this describes your club, now may be the time to consider a signature project.

A signature project is a significant service initiative, one for which a club is clearly recognized in the community and that differentiates it from other organizations.

Small projects, while worthwhile, are difficult to leverage into lasting community impact and awareness. A major project, on the other hand, creates a "signature" for the club, one which establishes public recognition that Rotary is a dynamic, action-oriented service organization and one in which others want to get involved.

Signature projects can range from the purchase and staffing of a Rotary bookmobile traveling throughout the city to an annual regional marathon that raises funds to support homeless teens.

Attributes of a signature project include substantial size, scope and duration: it continues or repeats regularly for a number of years. It integrates most functional areas of a club, all or nearly of its members (many clubs have a goal of 100% member involvement) and engages outside partners and community members. It usually addresses a significant and recognized need.

The benefits? In addition to providing service in response to an important community concern, it increases visibility of the club, attracts new funding sources, increases hands-on service by members, motivates non-Rotarians to become engaged and often provides an opportunity for a Foundation grant. All accomplished by a single project.

A signature project requires careful advance planning due to its size and impact, but the results of a signature project for the community and the club are well worth the commitment.

One remarkable example of a significant signature project in Zone 24 is "Rotary Park," developed by the Novosibirsk Initiative club (District 2225). Although still under construction, the nearly \$500,000 project to serve handicapped children is already delivering benefits to the community and to Rotary, and supported an increase in club size of nearly 90% since 2012.

[Read the full story.](#)

If your club is considering a signature project, contact the Rotary Coordinator in your region to discuss steps to get started or check the Signature Project resources page at [www.GreatIdeasToShare.com](http://www.GreatIdeasToShare.com).



# Rotary Voices

Stories of service from around the world

## Tips for smarter fundraising

Posted on **May 11, 2015**



*By Evan Burrell, a member of the Rotary Club of Turramurra, New South Wales, Australia, and a regular contributor to this blog*

I'm not a huge donor with the capability of making or breaking your club's fundraising campaign. At least not yet. And I am fully aware Rotary isn't just a fundraising organization. But we do need funds to carry on our service projects and do good in the world.

So here are a few of my ideas for how to put fun back in your fundraiser, and increase your reach and effectiveness.

Members of a Rotary Club in Illinois, USA, cut oranges during an event to raise money for club projects.

### **Use online crowdfunding sites**

Rotary clubs generally underutilize social media to raise funds. Sites like [Gofundme](#), [Kickstarter](#), [Indiegogo](#), and [Rotary Ideas](#) get instant donations for your cause. And you can

use the built-in features to share it on social media. Just look at how much has been raised in a short period of time for [victims of the Nepal earthquake](#).

### **Share YOUR story**

If you want people to donate, you need to give them a reason why. People need to hear about the amazing things Rotary has done, and how Rotary has impacted you. Take polio, for example. Many people in the west don't have any firsthand experience with the effects of polio, because the region has been polio-free for some time. So we need to continue to personalize the campaign. Relay how polio has personally touched you or someone in your family, such as a parent or grandparent.

### **Put it into perspective**

When people donate, you need to thank them and tell them where the donation is going. For example "That \$150 donation you gave just funded hundreds of lifesaving polio vaccines." For the cost of a cup of coffee, you can save 40 lives from polio.

### **Brainstorm ideas and events!**

Be creative and think of things that can involve everyone in your club and make a memorable campaign. Try a barbecue cook-off, cake bake, a roller skating marathon, or organize a Rotary family sports game and donate the proceeds to your cause. Stand out by setting a theme to your event, Maybe you can have a combined district dinner incorporating costumes. If people are having fun, they are more likely to donate.

### **Build awareness:**

Promoting your event is a huge part of any fundraiser. If you want people to attend, and more importantly give money, you need to tell them about your event. It is as simple as that! Think about your audience and where you can reach them. Attend other club meetings, district events, use social media, put ads in the local press or even on television if you are running a large enough event.

### **Don't forget your call to action**

People want to help, but they need reminders. After nearly every speaking engagement or social media post, include a call to action. These can include things like "Tell your friends," "share this," "spread the word," "get your early-bird event tickets," etc.

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Learn more about [how you can pay for your project through fundraising events](#)



**SHARE THIS:**

19 Votes

**RATE THIS:**

# 3

## ASSESS YOUR RESOURCES

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

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



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

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



TIME FRAME	TASKS
1 week before	<ul style="list-style-type: none"><li><input type="checkbox"/> Send email reminder to registered attendees</li><li><input type="checkbox"/> Rehearse the program with speakers</li><li><input type="checkbox"/> Determine last-minute vendor needs</li><li><input type="checkbox"/> Prepare goody bags, handouts, etc.</li><li><input type="checkbox"/> Contact media about the event</li><li><input type="checkbox"/> Provide guarantees to the event venue</li><li><input type="checkbox"/> Hold final meeting of planning committee with vendors to review all arrangements and timing</li></ul>
2 days before	<ul style="list-style-type: none"><li><input type="checkbox"/> Send final email reminder to presenters and attendees</li><li><input type="checkbox"/> Continue to follow up with media contacts</li><li><input type="checkbox"/> Hold a final meeting with venue personnel to review the detailed schedule</li><li><input type="checkbox"/> Deliver all materials to the venue</li></ul>
Event day	<ul style="list-style-type: none"><li><input type="checkbox"/> Set up signs, tables, program materials, etc.</li><li><input type="checkbox"/> Do a final review and walk-through of the event site</li><li><input type="checkbox"/> Perform audiovisual checks</li><li><input type="checkbox"/> Greet vendors and speakers</li><li><input type="checkbox"/> Assign someone to greet media representatives and introduce them to speakers and partners</li><li><input type="checkbox"/> Identify key people for photographer</li><li><input type="checkbox"/> Collect contact information from walk-in attendees for follow-up</li></ul>

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



Session B-7 **Enhancing Community Awareness of Your Rotary Club** (60 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduction & Start	Quickly introduce yourself. Provide topic – have participants open PE Workbook to B-7	2 min.
2.	1st Learning Objective	<p>Explain to club members possible answers to "What is Rotary?"</p> <p>Facilitate classroom discussion: How can you promote Rotary and the work your club is doing to improve your community? How can you create the opportunity to build relationships with club members and strengthen their Rotary experience ?</p>	15min
3.	2nd Learning Objective	<p>Define how the club President can create a positive public image and public perception</p> <p>Have participants turn to pp. 47-50 of LYC.</p> <p>Facilitate classroom discussion: How can you prepare to serve as your club's spokesperson? How would you rate your club's current public image? What steps could you take to enhance public perception of your club?</p>	18 min
4.	3rd Learning Objective	<p>Articulate the role of the club president, PR committee, and individual Rotarians in enhancing the local image of Rotary</p> <p>Divide the participants into trios (start at one side of the u and have the 1<sup>st</sup> three form a trio, the next three as a trio, etc. If you end up with four in final group, that is ok. If only 2, then ask room host/facilitator to join them to make a trio.). Have the trios describe the role of the club president and the role of the PR Committee (4 minutes). Then ask: What is the key difference between the roles? (2 minutes)</p> <p>Then ask whole class: What are specific ways individual Rotarians can enhance the image of Rotary? (4 minutes) [<i>Rotary shirts. Pins, 4-Way test signage, shop Rotary, Rotarian magazine in lobby or with them at lunches</i>]</p>	18 min
5.	Q & A	Ask for any questions and respond briefly	4 min
6.	Wrap up and evaluations	<p>Thank participants for an impactful and inspiring session.</p> <p>Ask them to go to notes page at end of module and jot down their thoughts.</p> <p>Remind participants to complete module evaluation via mobile app.</p> <p>Proceed with transition to next module topic and facilitator.</p> <p>Proceed with transition to lunch.</p> <p>Tell them that the first afternoon breakout starts at 1:30 pm and that you will be facilitating that session as well. Course materials may be left in the room. Take valuables (laptops/tablets etc.) with them.</p>	3 min



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

**SATURDAY, FEBRUARY 29, 2020**

**SESSION B-7**

**ENHANCING COMMUNITY AWARENESS OF YOUR ROTARY CLUB**

### **GOAL**

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

### OBJECTIVES

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

1. Explain to club members possible answers to "What is Rotary?"
2. Define how the club President can create a positive public image and public perception
3. Articulate the role of the club president, PR committee, and individual Rotarians in enhancing the local image of Rotary

### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 6: Promoting Rotary





# KEY POINTS FOR TALKING ABOUT ROTARY



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

## **INTRODUCTORY PRIMARY MESSAGE**

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

## **SUPPORTING MESSAGE**

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

## **ABOUT ROTARY — PRIMARY MESSAGES**

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

## **SUPPORTING MESSAGES**

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

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

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

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

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

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

# STRATEGIES FOR PROMOTING YOUR CLUB



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

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

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

## PUBLIC RELATIONS

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

## MEDIA RELATIONS

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

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

## MARKETING

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

## SOCIAL MEDIA

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

## EVENTS

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

## CLUB WEBSITE

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

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



## ROTARY DAYS PHOTOS

During and after your event, post photos and videos with the hashtag #RotaryDay to social media. We'll collect photos of Rotary Day events around the world and show them at the 2019 Rotary International Convention in Hamburg, Germany. Some may also appear in Rotary media throughout the year.

138

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

Rotary's Vision Statement

9008-EN—(1217)





## This year,

urge you to *Be the Inspiration* by hosting Rotary Days. These local, community-oriented events highlight the transformational activities that our Rotary, Rotaract, and Interact clubs undertake every day. You can hold a Rotary Day anytime. It will offer you the chance to have an impact in your community, build long-term partnerships, increase interest in membership, and improve Rotary's image. Imagine the collective impact we can have if all 35,000 Rotary, 10,000 Rotaract, and 22,000 Interact clubs engage their neighbors, friends, young people, and organizations. Will you do your part by encouraging clubs and communities to unite, inspiring transformational action, and creating lasting change?

**Be bold, be innovative, and show the magic of Rotary.**

— Barry Rassin, President, Rotary International

## HOSTING A ROTARY DAY

Any club, big or small. Rotary or Rotaract or Interact, can inspire its community by hosting a Rotary Day. Neighboring Rotary and Rotaract clubs might combine their ideas, talent, and resources to co-host an event. Even entire districts can come together to host one big Rotary Day.

Rotary Days underscore our warm and cohesive community, show others our inspirational work, introduce Rotary to the larger community, and motivate action. They can take any form, as long as they are fun and engaging, involve young people, and are open to all. Clubs are encouraged to add innovative components to their public events.

## TIPS FOR ROTARY DAY PLANNERS



BE THE INSPIRATION

## Consider partnering with:

- » Nearby Interact, Rotaract, and Rotary clubs
- » Local Rotary Community Corps
- » Young professionals groups
- » Community centers
- » Other service organizations
- » Civic society leaders
- » Local businesses



- » Consider including a hands-on service project as part of the event to let visitors see for themselves how Rotary benefits the community.
- » Feature guests that appeal to a non-Rotary audience. Consider young leaders, inspirational speakers, celebrities, musicians, or other public figures.
- » If the event will offer food, keep it simple — for example, a self-service buffet rather than a formal, sit-down meal.
- » Advocate on local issues related to Rotary's areas of focus by calling attention to challenges that affect people in your area.
- » If you charge admission, keep prices low. Ask local businesses to sponsor your event.
- » Welcome families and make the event enjoyable for them.
- » Present Rotary as an appealing opportunity for potential members to make new friends, exchange ideas, and take action to improve their community and the world. Avoid using Rotary jargon or referring to club traditions.
- » Highlight the work of local Rotarians, Rotaractors, Interactors, Rotary Community Corps members, and other community members who do extraordinary humanitarian work.
- » Recognize non-Rotary community members who demonstrate Rotary's service ideals.
- » Sponsor an event with a partner organization to show that, by working together, we make a deeper and more lasting impact on communities.
- » Ask local news media to cover the event.
- » Collect participants' contact information, and invite them to future club events.



ORGANIZATIONAL CULTURE

# Build a Culture to Match Your Brand

by Denise Lee Yohn

December 17, 2019



MirageC/Getty Images

If you are simply aiming for a “good” culture at your organization, you’re setting the bar too low. An organization that embraces values like integrity and teamwork is really no different from any other. If you want to produce the kinds of specific

outcomes that will allow you to differentiate your company, you need to define a unique culture that cultivates the necessary kinds of employee attitudes and behaviors.

Building this unique culture goes beyond internal aspirations. Companies that do this well also identify a *desired brand identity*, which I define as how you want your organization to be perceived and experienced by customers and other external stakeholders. If your company culture is aligned and integrated with that identity, your employees are more likely to make decisions and take actions that deliver on your brand promise.

It takes work to make this culture-brand connection. You can start by considering the different types of brand identities and where your company fits. Brand types are categories of brands that share the same strategic approach or take similar stances to shape their competitive positioning.

Brand types differ from brand *archetypes*, which classify brands according to classic storytelling character types such as the Hero, the Joker, and the Sage. While brand archetypes can be helpful in creating a narrative and tone of voice to use in advertising campaigns and other communications, the brand types I'm referring to here are strategic ways that brands compete and are positioned relative to each other. For example, Patagonia falls into the "conscious brand" type because it is characterized by its sustainability mission, while Apple is an "innovative brand" type given its pursuit of new products.

Having worked on a broad range of brands for more than 25 years — enterprises and small businesses, local and international, B2C and B2B, start-ups and companies with long histories — I’ve concluded that there are only nine general brand types (see the chart below). A note on the company examples I’ve included: There is an element of subjectivity when determining the brand type of brands that are not your own, and this is my assessment.

## The 9 Types of Company Brands

Brand type	How the brand behaves and competes	Reference point in market	Tone and manner	Company examples
Disruptive	Challenges the current ways of doing things and introduces new concepts that substantively change the market	Category leader	Rebellious, confident, daring	Virgin, Airbnb, Dr Pepper
Conscious	Is on a mission to make a positive social or environmental impact or enhance people’s quality of life	Higher purpose	Inspiring, thoughtful, transparent	Seventh Generation, SoulCycle, Patagonia
Service	Routinely delivers high-quality customer care and service	Customer need	Humble, predictable, friendly	Nordstrom, USAA, Ritz Carlton
Innovative	Consistently introduces advanced and breakthrough products and technologies	Possibility	Risk-taking, imaginative, progressive	Apple, Nike, Amazon
Value	Offers lower prices for basic quality products or services	Higher-priced brand	Down-to-earth, practical, straightforward	Walmart, IKEA, Subway
Performance	Produces products or services that deliver superior performance and dependability	Performance standard	Precise, competent, reliable	BMW, FedEx, American Express

Luxury	Offers higher quality at higher price	Populist brand	Discriminating, refined, glamorous	Tiffany, Mercedes-Benz, Hermes
Style	Is differentiated by the way its products or services look and feel, as much as or more than by what they do	Functional brand	Creative, stylish, contemporary	Target, JetBlue, Mini Cooper
Experience	Is differentiated by the experience it offers, as much as or more than by the product or service	Customer emotion	Exciting, energetic, imaginative	Disney, American Girl, Wegmans

Source: Denise Lee Yohn

HBR.org ©

Some of these brand types overlap, and some characteristics are—or should be—embraced by all brands. All brands should offer good service, for example. But a brand that falls into the service brand type prioritizes delivering high-quality customer care and service above anything else — and its strategies, operations, and ultimately customer value propositions are all centered around differentiating through great service.

Each of the nine brands types is distinguished by two main characteristics. The first one is what I call its point of reference — that is, the standard that your brand is positioned relative to or how you want customers to understand your brand. A disruptive brand like Richard Branson’s Virgin is all about challenging the leader in every category, so Virgin brand’s point of reference is the category leader. The second characteristic that distinguishes a brand type is its tone and manner, which

is how the brand usually behaves or expresses itself. For example, Walmart and Subway fall into the value brand type and they tend to act in down-to-earth, practical, and straightforward ways.

## **Brand and Core Values**

Once you know the type of brand you have or want to build, the next step to aligning external brand and internal culture is to identify the kind of culture required to deliver on it. Different types of brands are achieved through different types of cultures. If you want to position your brand as disruptive, for example, then you must cultivate a culture of risk-taking so that your people are inclined to act boldly and break market conventions.

As part of this process, I recommend determining the core values you need to cultivate your desired culture. Core values — the essential and enduring principles and priorities that prescribe the desired mindset and behavior of everyone who works at your company — are the cornerstones of your culture. They reflect what's important to your organization and, if used properly, they shape your people's attitudes and actions. If you know the types of core values you need to manifest your particular brand type, you can design the other aspects of your culture to align with, build on, and reinforce them.

In the research I conducted for my book I was able to isolate the types of core values that correspond to each brand type. Here are the top organizational values by brand type:

**Disruptive brand:** Competition, standing out, and risk taking.

**Conscious brand:** Purposefulness, high commitment, and transparency.

**Service brand:** Caring, humility, and empathy.

**Innovative brand:** Inventiveness, experimentation, and continuous improvement.

**Value brand:** Accessibility, fairness, and pragmatism.

**Performance brand:** Achievement, excellence, and consistency.

**Luxury brand:** Sophistication, distinction, and status.

**Style brand:** Design, discernment, and creativity.

**Experience brand:** Entertainment, enjoyment, and originality.

You should use these values as starting points for drafting your own unique core values. You have to make your company's core values your own and then operationalize them. You should apply them to your organization by fleshing them out into a full set of core values that fit your organization and your specific brand identity. Then you'll need to define how those core values relate to behaviors and expectations unique to your organization.

Some of the best examples I've seen of this in action are companies like Salesforce, which is known for being inspiring; Southwest Airlines, fun; Starbucks, sincere.

All three of these companies cultivated a unique organizational culture that is aligned and integrated with a strong brand identity.

Your company culture needs to be as distinct as your brand. You can achieve this whether your culture is friendly or competitive, nurturing or analytical. And remember, there is no single right type of culture, just as there isn't one best type of brand.



**Denise Lee Yohn** is a leading authority on positioning great brands and building exceptional organizations, and has 25 years of experience working with world-class brands including Sony and Frito-Lay. Denise is a consultant, speaker, and author of *What Great Brands Do: The Seven Brand-Building Principles that Separate the Best from the Rest* and the new book *FUSION: How Integrating Brand and Culture Powers the World's Greatest Companies*.

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## **This article is about ORGANIZATIONAL CULTURE**

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## Session C-8 Identifying Change for Progress Sake (60 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduction & Start	Provide topic – have participants open PE Workbook to C-8 Reflect on the reaction to change: How do people react to change? What makes you feel better about making a change?	6 min.
2.	1st Learning Objective	Identify attributes of a vibrant Rotary club  Have participants refer to their <b>Be a Vibrant Club</b> brochure. Have them read page 4  Then facilitate classroom discussion: What makes a Vibrant club? How do you know if your club is making progress towards being vibrant?	8 min
3.	2nd Learning Objective	Recognize the Club President's role in leading changes to be a Vibrant club  Refer participants to both Leading Meaningful Change resource page and A Model for Change Planning chart in PE Workbook.  Facilitate classroom discussion: In what ways can a president effectively promote change within the club? Which steps of leading change are most challenging to accomplish?	8 min
4.	3rd Learning Objective	Articulate insights about their club character and culture  Have the participants circle up inside the U. Stand in the circle with them and start with the person to your right. Ask that person what change they would like to make within their club. Continue around the circle until every participant has declared an area for change.  Have participants return to their seats.	20 min
5.	Documenting aspects of needed change	Tell them to write this down as an action item to include in their annual plan and ID potential change champion.  Then have them refer to their Creating Your Club Leadership Plan from A-1 on Friday  Now add notes based on your insights over these two days.	15 min
5.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	3 min



# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

**SATURDAY, FEBRUARY 29, 2020**

### **SESSION C-8      IDENTIFYING CHANGE FOR PROGRESS SAKE**

#### **GOAL**

**Club Presidents will have insight about assessing needed change within their respective clubs in relation to Vibrant Club characteristics.**

#### OBJECTIVES

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

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

#### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 1: Planning Your Year

Lead Your Club: President -- Chapter 2: Leading Rotarians



## **Leading Meaningful Change**

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

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

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

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

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

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

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

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

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

## Why do some changes fail?

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

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

NOTES:

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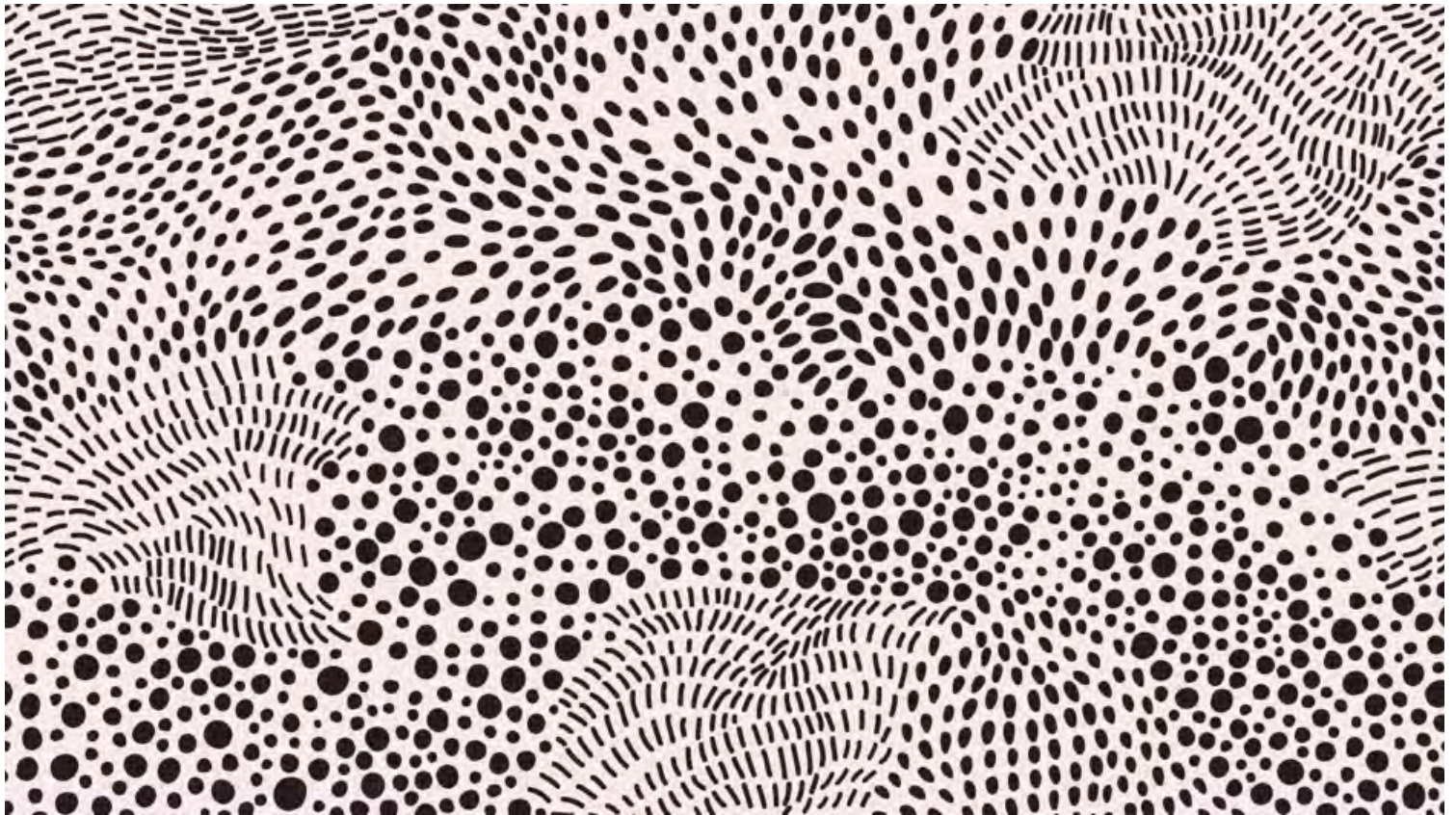


CHANGE MANAGEMENT

# All Management Is Change Management

by Robert H. Schaffer

OCTOBER 26, 2017



MARIA GALYBINA/ISTOCK

Change management is having its moment. There's no shortage of articles, books, and talks on the subject. But many of these indicate that change management is some occult subspecialty of management, something that's distinct from "managing" itself. This is curious given that, when you think about it, all management is the management of change.

If sales need to be increased, that's change management. If a merger needs to be implemented, that's change management. If a new personnel policy needs to be carried out, that's change management. If the erosion of a market requires a new business model, that's change management. Costs reduced? Productivity improved? New products developed? Change management.

The job of management always involves defining what changes need to be made and seeing that those changes take place. Even when the overall aim is stability, often there are still change goals: to reduce variability, cut costs, reduce the time required, or reduce turnover, for example. Once every job in a company is defined in terms of the changes to be made (both large and small), constant improvement can become the routine. Each innovation brings lessons that inform ongoing operations. The organization becomes a perpetual motion machine. Change never occurs as some sort of happening; it is part of everyday life.

Today's change management movement has arisen in response to the difficulty companies have had in making constant, rapid improvement a routine aspect of work. Efforts to overcome this have led to the bifurcation of organizational life into ordinary times and change management times. As an increasing number of people take on the role and mindset of the change management professional, instead of striving to make innovation and improvement routine, they naturally encourage the treatment of change as something

special. Managers start to view change as an extraordinary event that must be dealt with using change management techniques and special skills. And then it's easy for people to become resistant to change.

What needs to change is that thinking. Leaders should view change not as an occasional disruptor but as the very essence of the management job. Setting tough goals, establishing processes to reach them, carrying out those processes and carefully learning from them – these steps should characterize the unending daily life of the organization at every level. More companies need to describe their work in terms of where they are trying to go in the next month or next quarter or next year.

How do you transition into such a company? The simple answer is to skip the months spent creating a comprehensive plan to make the company more change-oriented. Instead, focus on some important goals that are not being accomplished. Have teams carve out some sub-goals they will aim to achieve in a few months. They should be asked to test innovative steps they think will make a difference and to learn from the process. Maintaining a short time frame for these experiments permits the rapid testing of many modest innovations. Of course, these are steps to advance major strategic goals, but the emphasis should be on executing specific changes – with each success followed by a new round of more-ambitious goals to tackle.

For example, Gary Kaplan, president of XL Catlin's North American Construction insurance, got his division started by formulating some major strategic goals. Then he launched a series of short-term "results-seeking projects," each focused on achieving some aspect of those strategic goals. The projects aimed to have people experiment with innovation. As they tested ideas and learned from them, they incorporated new ways of working into the fabric of the organization.

Each year they carry out about 50 such results-seeking projects. Of those recently completed, one won \$8 million of new business in a particular region of the country and another focused on reducing costs by redesigning a process to shift major tasks to lower-level, less-costly staff. Kaplan's project-centric strategy allowed the company to bring in \$1 billion of premium revenue five years after the launch of the division, and then another billion dollars in the next 18 months.

A critical part of this evolution is holding managers accountable for continuing improvements. As Kaplan told me, by making the operating managers responsible, they develop their capacity to lead continual change while their people develop the capacity to implement it. Specialist experts can be used for support, but actual management of the changes must remain in the hands of the managers. Because, as Kaplan so neatly demonstrates, change management is management, and management is change management.



Robert H. Schaffer ([rschaffer@schafferresults.com](mailto:rschaffer@schafferresults.com)) is the founder of Schaffer Consulting in Stamford, Connecticut. He is also a coauthor of *Rapid Results! How 100-Day Projects Build the Capacity for Large-Scale Change* ([Jossey-Bass, 2005](#)).

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**This article is about CHANGE MANAGEMENT**

 FOLLOW THIS TOPIC

## This image shows a full page of blank, lined paper. It features approximately 28 horizontal blue lines spaced evenly across the page, typical of standard notebook paper. The lines are thin and light blue, set against a plain white background. There are no margins, text, or other markings on the page.



## Session C-9 Are You a Leader Who Leads? (60 minutes)

	Step?	We want to accomplish?	How long?
1.	Start final session	Provide topic – have participants open PE Workbook to C-9 Refer to the Flexible options for clubs and Club Models handouts in the Workbook. We are laying the groundwork for formulating an action plan for leading change	1 min.
.	1st Learning Objective  2nd Learning Objective  3rd Learning Objective	Develop a personalized leadership approach  Recall strategies used by other clubs to effectively build pride and team spirit within their club  Outline a plan of action for addressing needed changes in their clubs	Will Achieve all 3 through group activity
2.	Group interaction to achieve all three learning objective	Have participants count off by two. Have the 1's form a circle of chairs at the back of the U and Have the 2's form a circle of chairs within the U. A facilitator joins each circle.  Announce the ground rules: The first person briefly shares the area in their club they would like to change. The rest of the circle (including the facilitator) offer ideas from their experience that could help effect that change.  (Watch the time and limit the 1 <sup>st</sup> person to 4 or 5 minutes depending on # in the circle).  Continue around the circle in a clockwise pattern (from the person who volunteered to go first). Each person declares their desired change. The circle offers ideas from their experience.  (As the process continues, some people will indicate their change area as similar to a prior person's and already has the ideas to consider. Adjust time limit per person to finish the circle within the allotted time)	50 min
3.	Q & A	Have the two circles return to their seats. Ask for any questions and briefly respond.	3 min
4.	Wrap up and evaluations	1 <sup>st</sup> facilitator: Share two minute inspirational and uplifting Rotary leadership message with congratulations and best wishes for their year of service as club president.  2 <sup>nd</sup> facilitator: Thank participants for an impactful and inspiring day with acknowledgements for their year of service as club president. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation -- for facilitator who participated in their circle -- via mobile app. Proceed with transition to schedule of evening program and events.	6 min





# Lone Star P.E.T.S. 2020

## PRESIDENTS-ELECT WORKBOOK

**SATURDAY, FEBRUARY 29, 2020**

**SESSION C-9      ARE YOU A LEADER WHO LEADS?**

### **GOAL**

**Club Presidents will be able to optimize their influence in each respective club by effectively leading and motivating toward creating and maintaining a Vibrant Club.**

### OBJECTIVES

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

1. Develop a personalized leadership approach
2. Recall strategies used by other clubs to effectively build pride and team spirit within their club
3. Outline a plan of action for addressing needed changes in their club

### REFERENCE MATERIALS

Lead Your Club: President -- Chapter 2: Leading Rotarians



## Flexible options for clubs

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

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

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

### Start a new type of club

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

#### Benefits:

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

#### Resources:

- [Rotary club models](#) (PDF)

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

## Offer alternative membership types

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

### Benefits:

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

### Resources:

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

## Change meeting format

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

### Benefits:

- Makes club meetings more interesting, which engages members and guests
- Creates culture where agility and creativity are valued and demonstrated

- Members can gain professional development skills

#### **Resources:**

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

## **Relax attendance expectations / reduce meeting frequency**

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

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

#### **Benefits:**

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

#### **Resources:**

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

## **Resources & reference**

- [Club Planning Assistant](#) (interactive form)
- [Practicing Flexibility and Innovation \(online course\)](#)

- [Rotary Club Models \(PDF\)](#)
- [Guide to Satellite Club \(PDF\)](#)
- [Satellite club FAQ \(PDF\)](#)
- [Satellite club application \(PDF\)](#)
- [Satellite club member information form \(PDF\)](#)
- [Guide to Corporate Membership \(PDF\)](#)
- [Corporate Membership: Making the offer \(DOC\)](#)
- [Corporate Membership: Sample Bylaws \(DOC\)](#)
- [Guide to passport clubs \(PDF\)](#)
- [Sample passport club bylaws \(DOC\)](#)
- [Membership Flexibility Overview \(DOC\)](#)
- [Rotary's governance documents](#)
- [Start Guide for Alternate Membership Types \(includes sample bylaws\) \(DOC\)](#)
- [Start Guide for Flexible Meeting Formats \(includes sample bylaws\) \(DOC\)](#)
- [Club flexibility Frequently asked questions](#)

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## CLUB MODELS

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves. The criteria for membership are simple. For Rotary clubs, a member needs to be an adult — or for Rotaract clubs, a person age 18-30 — who demonstrates good character, integrity, and leadership; has a good reputation within their business or profession and community; and willing to serve in the community or have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

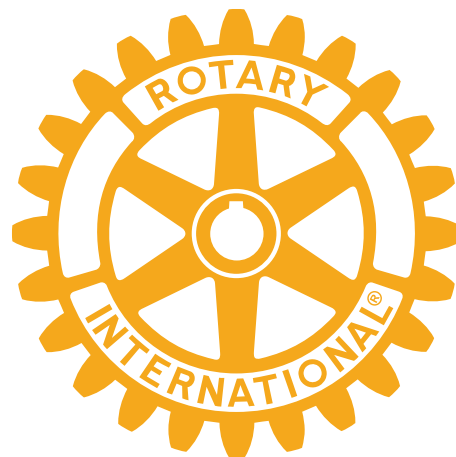
Club Model	Description	Appeals to	Minimum number of charter members
<a href="#">Traditional Rotary Club</a>	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and traditions Learn more at <a href="#">Start a Club</a> .	20
<a href="#">Satellite Club</a>	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time other than <b>what's</b> offered by the traditional clubs in the area Learn more in the <a href="#">Guide to Satellite Clubs</a> .	8
<a href="#">E-Club</a>	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience Learn more about <a href="#">online club meetings</a> .	20
<a href="#">Passport Club</a>	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people Learn more in the <a href="#">Guide to Passport Clubs</a> .	20
<a href="#">Corporate Club</a>	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community	20
<a href="#">Cause-Based Club</a>	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems.	20
<a href="#">Alumni-based Club</a>	A club whose members (or most of them) are former Rotary or Rotary Foundation program participants	People who have participated in Rotary outside of a club	20
<a href="#">Rotaract Club</a>	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service. Learn more in the <a href="#">Rotaract Handbook</a> .	n/a

All club models meet at least twice each month. With exception of Rotaract clubs, all active members pay US\$68.00 in annual dues, are counted in Rotary International's database, and have voting privileges.

# LEADERSHIP IN ACTION

Business and community leaders share a drive to continue developing new skills, both personal and professional. What if your club could offer those opportunities to members and other professionals in your community?

Start with Rotary's **Leadership in Action** guide to bring people together to strengthen their skills and their club.



## ENGAGE CURRENT MEMBERS

Keep members' skills fresh by inviting them to get involved in your club's professional development program. Members can organize the event, lead sessions, or participate as learners.

Members who expand their knowledge can use their new skills to make meaningful change in their communities.

### PROMOTIONAL RESOURCES

Visit the **Brand Center** to download a customizable flier to advertise your event in the community.

Consider other companion pieces for your event, like the club brochure.



## ATTRACT COMMUNITY PROFESSIONALS

Consider offering training to community members to expose them to Rotary. Invite such prospective members as:

- + Young professionals
- + Rotaractors
- + Rotary alumni
- + Colleagues
- + Members' family and friends



## GET STARTED WITH YOUR PROGRAM

Download **Leadership in Action** from My Rotary. It's a new guide that makes it easy to develop your club's program.

It includes customizable curriculum on:

- Communication
- Leadership styles
- Mentoring
- Time management
- Goal setting
- Living our values
- Building consensus
- Teamwork
- Professional image
- Innovation

Use Leadership in Action to build the skills of club members, attract professionals to Rotary, and make your club stronger!

[www.rotary.org/myrotary](http://www.rotary.org/myrotary)



for decision-making; virtual reality simulations; and a host of new experiential programs, online courses, and university certifications. With such a flurry of developments, there must be some useful new ways to think about leadership.

The reality, however, is somewhat different. Yes, the leadership development industry is thriving, and yes there are a lot of new and interesting ideas, some of which may prove to be helpful. But despite many changes in our context — as organizations have become more democratic and networked, for example — in its fundamentals leadership has not changed over the years. It is still about mobilizing people in an organization around common goals to achieve impact, at scale.

This tried and true perspective on leadership was reinforced for us during the past year as we researched and wrote the *HBR Leader's Handbook*. We interviewed over forty successful leaders from a variety of organizations (corporate, non-profit, startup), across different industries. We then reviewed several decades worth of articles from the Harvard Business Review to understand the recurring messages from academics and practitioners about what leaders should do. Our conclusion from this research, and from our own years of experience as leadership and organizational advisors, was that the best leaders with the most outside impact almost always deploy these six classic, fundamental practices:

1. uniting people around an exciting, aspirational vision;
2. building a strategy for achieving the vision by making choices about what to do and what not to do;
3. attracting and developing the best possible talent to implement the strategy;
4. relentlessly focusing on results in the context of the strategy;
5. creating ongoing innovation that will help reinvent the vision and strategy; and
6. “leading yourself”: knowing and growing yourself so that you can most effectively lead others and carry out these practices.

Sure, sometimes the starting point is different, or one of the six areas requires more heavy lifting than another, or the sequence of activities varies. And yes, leaders go about these practices in different ways depending on their personalities and their situations. But the same handful of practices are always present.

For example, when Seraina Macia (one of the leaders we interviewed) joined XL Insurance in 2010 to head their North American Property and Casualty unit, it was a stable, but slow- growth business. As she learned about the numbers, the organization, and the markets, Macia envisioned that the unit could be transformed into a much faster-growing and more profitable company with a wider range of product offerings. Bringing her team together around this vision, and sharpening it with their help, which is the first fundamental practice, became the focus of her early days with XL.

To translate that vision into action, Macia then challenged her team to triple the level of premiums, without sacrificing underwriting quality, in three years — and asked each of them to quickly develop a strategy for how to make that happen in their product areas, and how to best use underwriting and the other support functions to do it. She then worked with each manager to help them craft these strategies, making choices about how to deploy resources, where to focus, and how fast to proceed. This is the essence of the second core practice that we heard about in our research.

When some of Macia's team members struggled to come up with thoughtful strategies, or couldn't move quickly into action, she gave them tough feedback, pushed them beyond their comfort zones, gave them developmental help as needed, and in some cases replaced them or moved them to other positions. These actions were all in the service of building the best team to implement the strategy, which is practice number three.

This stronger team was then able to respond to Macia's unrelenting drive for results by quickly testing new ideas, engaging local brokers, expanding target markets, and a host of other specific action-steps, all of which were aimed at focusing on results, which is the

fourth practice. As results came in, Macia encouraged the team, to reassess their plans, learn from their experiences, innovate, and continually improve, which exemplifies the fifth practice, innovation. For instance, some of the teams experimented with sending underwriters out to the field to work with brokers so that they would send them business that was more likely to be underwritten by XL, a complete departure from past practices, and one that turned out to be key to the unit's success.

While taking these actions, Macia also was learning about her own leadership, what worked and what she needed to do differently. Gradually she learned how best to allocate her time, how to build support from other parts of the company, what metrics were most useful, and how to make faster decisions about people, all of which is part of the leading yourself practice.

Most importantly, by putting all six of these practices together, Macia succeeded in doubling the level of profitable premiums in two years and (after she left for another job) seeing her successor reach the original goal of tripling the business the year after.

To move their organizations to the next level, all of the leaders we talked with deployed these practices — practices that are supported by numerous studies and articles, many of them far from new. And even though these leaders were operating in different industries, geographies, and with new technologies and structures, they were still dealing with people who needed to work together to achieve a common goal, which is what leadership has always been about. So when it's time to think about developing bigger leaders—as our HR executive wanted to do—we believe the secret is not to look for a new framework, but rather to help leaders master the tried and true practices that already exist.



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# Resources

## General Resources

RESOURCE	DESCRIPTION
<a href="https://my.rotary.org/en/document/how-set-goal-rotary-club-central">How to Set a Goal in Rotary Club Central</a> <a href="https://my.rotary.org/en/document/how-set-goal-rotary-club-central">https://my.rotary.org/en/document/how-set-goal-rotary-club-central</a>	A step-by-step visual guide to selecting and setting a goal in the Rotary Club Central tool for club officers
<a href="https://my.rotary.org/en/document/how-report-progress-goals-rotary-club-central">How to Report Progress on Goals in Rotary Club Central</a> <a href="https://my.rotary.org/en/document/how-report-progress-goals-rotary-club-central">https://my.rotary.org/en/document/how-report-progress-goals-rotary-club-central</a>	A step-by-step visual guide to updating goals with progress and achievements in the Rotary Club Central Tool for club officers
<a href="https://my.rotary.org/en/document/how-record-service-activities-rotary-club-central">How to Record Service Activities in Rotary Club Central</a> <a href="https://my.rotary.org/en/document/how-record-service-activities-rotary-club-central">https://my.rotary.org/en/document/how-record-service-activities-rotary-club-central</a>	A step-by-step visual guide to adding details about service projects and activities in the Rotary Club Central tool for club officers
<a href="https://my.rotary.org/en/document/how-view-information-rotary-club-central">How to View Information in Rotary Club Central</a> <a href="https://my.rotary.org/en/document/how-view-information-rotary-club-central">https://my.rotary.org/en/document/how-view-information-rotary-club-central</a>	A step-by-step visual guide to using features within the Rotary Club Central tool and viewing data at various levels for Rotarians

## Membership Resources

RESOURCE	DESCRIPTION

### Rotary Club Health Check (PDF)

<https://my.rotary.org/en/document/rotary-club-health-check>

Evaluate the health of your club and identify strengths and opportunities for improvement.

### Membership Assessment Tools (PDF)

<https://my.rotary.org/en/document/membership-assessment-tools>

Understand the similarities between your club and community to recruit and retain members.

### Strengthening Your Membership: Creating Your Membership Development Plan (PDF)

<https://my.rotary.org/en/document/strengthening-your-membership-creating-your-membership-development-plan>

Develop a plan to recruit, engage, and retain members.

### Connect to Membership Leads (PDF)

<https://my.rotary.org/en/document/connect-membership-leads>

Manage membership leads for your club or district.

### Club Flexibility

<https://my.rotary.org/en/club-flexibility>

Understand how the most recent Council on Legislation flexibility measures can help your club thrive.

## Young Leaders Resources

#### RESOURCE

#### DESCRIPTION

### Youth Exchange

<https://my.rotary.org/en/take-action/empower-leaders/start-exchange>

Learn more about Youth Exchange and how to get your club involved.

### Rotaract and Interact

<https://my.rotary.org/en/exchange-ideas/club-connections>

Understand how your club can get involved with Rotaract and Interact.

**Empower Leaders** Find new ways to engage young leaders in your community.  
<https://my.rotary.org/en/take-action/empower-leaders>

**Organize a RYLA event** Learn more about what goes into organizing a Rotary Youth Leadership Awards program.  
<https://my.rotary.org/en/take-action/empower-leaders/organize-ryla-event>

## Service Resources

RESOURCE	DESCRIPTION
<b>Lifecycle of a Project</b> <a href="https://my.rotary.org/en/take-action/develop-projects/lifecycle-project">https://my.rotary.org/en/take-action/develop-projects/lifecycle-project</a>	Learn about the steps that make a project successful and the tools available to help you do it.
<b>Engage Members</b> <a href="https://www.rotary.org/en/get-involved/rotary-clubs">https://www.rotary.org/en/get-involved/rotary-clubs</a>	Understand Rotary's history of service and various opportunities for your club to engage.
<b>District and Global Grants</b> <a href="https://www.rotary.org/en/our-programs/grants">https://www.rotary.org/en/our-programs/grants</a>	Learn about the different kinds of grants that The Rotary Foundation offers and how to apply.
<b>Rotary's Areas of Focus (PDF)</b> <a href="https://my.rotary.org/en/document/rotarys-areas-focus">https://my.rotary.org/en/document/rotarys-areas-focus</a>	Learn about the different kinds of grants that The Rotary Foundation offers and how to apply.
<b>Community Assessment Tools (PDF)</b> <a href="https://my.rotary.org/en/document/community-assessment-tools">https://my.rotary.org/en/document/community-assessment-tools</a>	Evaluate your community's needs so your club can plan effective, meaningful projects.

## Foundation Giving Resources



RESOURCE	DESCRIPTION
End Polio Now <a href="http://www.endpolio.org/">http://www.endpolio.org/</a>	Learn more about Rotary's fight to eradicate polio worldwide.
The Rotary Foundation Reference Guide (PDF) <a href="https://my.rotary.org/en/document/rotary-foundation-reference-guide">https://my.rotary.org/en/document/rotary-foundation-reference-guide</a>	Learn more about the Foundation's history and its efforts to improve the world.
Rotary Foundation Facts (PDF) <a href="https://my.rotary.org/en/document/rotary-foundation-facts">https://my.rotary.org/en/document/rotary-foundation-facts</a>	Get a snapshot of the Foundation's impact in 2016.
Paul Harris Society (PDF) <a href="https://my.rotary.org/en/document/paul-harris-society-brochure">https://my.rotary.org/en/document/paul-harris-society-brochure</a>	Learn more about the Paul Harris Society and how to encourage giving.

## Public Image Resources

RESOURCE	DESCRIPTION
Brand Center <a href="https://brandcenter.rotary.org/">https://brandcenter.rotary.org/</a>	The Brand Center has the digital resources clubs need to create communications that are effective and consistent with Rotary's image. Here you can find the Rotary club brochure template, press release designs, and other resources.
Voice and Visual Guidelines <a href="https://my.rotary.org/en/document/rotary-story-voice-and-visual-identity-guidelines-rotarians">https://my.rotary.org/en/document/rotary-story-voice-and-visual-identity-guidelines-rotarians</a>	Refer to this tool for guidance on the Rotary voice, club logos, and color palettes and font styles for club communications.
Messaging Guide <a href="https://my.rotary.org/en/document/rotary-story-messaging-guidelines">https://my.rotary.org/en/document/rotary-story-messaging-guidelines</a>	This document provides simple advice for telling Rotary's story in a clear, compelling, and consistent way.
Rotary Videos <a href="http://video.rotary.org">http://video.rotary.org</a>	Use these videos to educate your community about Rotary's impact.

# Rotary Citation Resources

RESOURCE	DESCRIPTION
<a href="https://my.rotary.org/en/news-media/office-president/presidential-citation">Rotary Citation Webpage</a> <a href="https://my.rotary.org/en/news-media/office-president/presidential-citation">https://my.rotary.org/en/news-media/office-president/presidential-citation</a>	Learn more about the Rotary Citation and download a copy of the brochure.
<a href="https://my.rotary.org/en/news-media/office-president/guide-earning-presidential-citation-your-rotary-club">Rotary Citation Achievement Guide</a> <a href="https://my.rotary.org/en/news-media/office-president/guide-earning-presidential-citation-your-rotary-club">https://my.rotary.org/en/news-media/office-president/guide-earning-presidential-citation-your-rotary-club</a>	Tips and tricks for mastering the Rotary Citation.
<a href="https://my.rotary.org/en/manage/club-district-administration/reports">Reports: Rotary Citation Dashboard</a> <a href="https://my.rotary.org/en/manage/club-district-administration/reports">https://my.rotary.org/en/manage/club-district-administration/reports</a>	Navigate to the Awards section of the reports page to check club progress toward the Rotary Citation.



