

# Rotary Carolinas' PETS



## President-Elect Curriculum Materials



**SERVE TO CHANGE LIVES**

March 18-20, 2021





## President-Elect Discussion Materials

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EFFECTIVE LEADERSHIP

Learning Objectives

At the end of this session, participants will be able to:

- 1. Understand the importance of developing and using goal-setting and strategic thinking as proven, effective club management strategies
- 2. Use Rotary Club Central at [www.rotary.org/ClubCentral](http://www.rotary.org/ClubCentral) to post and track club goals & Rotary Citation progress for the coming year
- 3. Understand the importance of developing and/or updating the club’s strategic plan
- 4. Understand the key leadership issues in operating a Rotary Club
  - a. Planning & Goal Setting
  - b. Budgets & Budgeting
  - c. Assembling & Preparing a Leadership Team
  - d. Club Assemblies
  - e. Leading Meetings
  - f. Strategic Planning
  - g. Succession and Sustainability planning
- 5. Use proven “best practices” for club leadership (NOW and throughout your year of leadership)

Notes & follow-up:

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## EFFECTIVE LEADERSHIP, continued

<b>Club Goal Setting</b>	<b>Club Budgets/Budgeting</b>
<b>Preparing YOUR Leadership Team</b>	<b>Club Assemblies</b>
<b>Leading Meetings</b>	<b>Strategic Planning</b>
<b>Club Sustainability</b>	<b>Other</b>

## EFFECTIVE LEADERSHIP, continued

### VISION, OBJECTIVES & GOALS

- What is **YOUR VISION** for your club during the year you serve as Club President? What will your club look like at the end of your term?
- You can't do everything. What are 3 (no more than 4) **OBJECTIVES** -- measurable achievements -- you want to accomplish as President?
  - Membership Growth
  - Service Projects Effectiveness
  - The Rotary Foundation Growth
  - Sustainability/Succession
- What **ACTION PLANS** will be needed to achieve those goals? (Who, What, by When?)
- How will you use the Rotary International My Rotary's CLUB CENTRAL to post and track your club's goals? [www.Rotary.org/ClubCentral](http://www.Rotary.org/ClubCentral)

### VISION

At the end of my term as President, I see my Rotary club ...

### OBJECTIVES (List three measurable achievements for 2021-22)

Note: You may have 2-3 incremental **GOALS** as part of each Objective — see next page

1.

2.

3.



## EFFECTIVE LEADERSHIP, continued

### GOALS

Each Objective may have intermediate goals. *For example:*

**Objective:** Increase member support of The Rotary Foundation

**Goals:**

1. 5 new Paul Harris Fellows
2. 100% Sustaining Members (\$100 per member per year)
3. 3 new Benefactors
4. Annual Fund per capita giving \$\_\_\_\_\_

### Strategies/Action Plans

What are the things we'll need to DO to accomplish our Goals & Objectives?

WHO will get those done, and by WHEN?

Action Plans - Objective 1		
Action Plan	Who	By When
Action Plans - Objective 2		
Action Plan	Who	By When
Action Plans - Objective 3		
Action Plan	Who	By When

## EFFECTIVE LEADERSHIP, continued

### Goal Setting

- Have you set your club goals for the coming year?
- Entered your goals in Rotary Club Central?
- How does your club determine which goals to set?  
Who will help you set your Club's annual goals?
- Who will monitor & report on status?



What gets measured  
gets done

### Key Points

- The following “best practices” strategies can help you and your club achieve desired goals:
- Establish and communicate a clear timeline
- Outline the specific steps needed to achieve the goal (actions needed)
- Determine WHO is responsible for implementing each step and assign the responsibility
- Consider the resources/tools available to help you
- Identify the criteria for measuring the club's progress and for what constitutes success
- Monitor/evaluate/report on the progress toward the goal

### LEADERSHIP TEAM

- Effective clubs have effective leadership TEAMS; it's hard for one person to make a truly effective club! How are you developing your leadership team? LOOK FOR NEW (and also proven) IDEAS in this session.
- Timing -- The time to have your leadership team lined up is NOW. If you don't have these key positions filled today, make that a priority for the month of April:
  - Membership Chair
  - Service Projects Chair
  - RI Foundation Chair
  - Club Administration Chair
  - Public Image Chair
  - Fundraising Chair





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## **EFFECTIVE LEADERSHIP**, continued

### **LEADING EFFECTIVE & ENGAGING MEETINGS**

To help ensure effective weekly meetings, club presidents can:

- Delegate the responsibility of arranging interesting programs to a club administration or program committee
- Create and publish meeting agendas/bulletins in advance
- Relate programs to current club projects and activities using the Rotary monthly theme calendar (see Resources and References Handout #6)
- Include programs that update members of Rotary information
- Begin and end the meetings on time
- Show Rotary Videos to begin your meeting to showcase projects around the world
- Display a slideshow of Rotary Images and your club's photos during meals and fellowship time to show pride in Rotary members at work and service.
- Have a contingency plan in case the scheduled program is cancelled
- **Refer to Club Meeting Agenda and Board Meeting Agenda in "Resources & References" section (Page 11)**

### **Club Assemblies**

- What will you discuss at your club assembly?
- Annual and long-range goals, goal setting, and club budget/finances
- Service projects and club activities
- Key committee reports/activities/updates
- Club training and member education strategies
- Membership engagement, growth, and retention strategies
- Attendance at the district conference or other district and RI meetings
- Any topic raised in an open forum

## EFFECTIVE LEADERSHIP, continued

### STRATEGIC PLAN

Creating a Strategic Plan for your club is not as daunting as it may seem. Use the Club Plan framework above (Vision, Objectives, Strategies/Action Plans), and stretch the timeline from one year to three years.

Add an assessment of Strengths, Weaknesses, Opportunities and Threats (SWOT) and you have a basic Strategic Plan that the club can build upon.

Strengths	Weaknesses
Opportunities	Threats

### SUSTAINABILITY & SUCCESSION PLANNING

Your role as a club leader also includes ensuring the vitality and future sustainability of the club. Developing a bench and a succession line of future leaders is an essential strategy for a healthy, vibrant club that will continue to do needed and worthy projects in your club’s community. Lack of sustainability & succession planning could mean that your current members become the last generation of Rotarians serving the needs of your community.

#### Club Leadership Development Culture

Identifying and cultivating future club leaders starts with:

- Committee assignment – a meaningful role on a key committee, preferably with a “mentorship-oriented” committee chair
- Committee Chair assignments – Clear-cut objectives and accountability where leadership skills are developed and demonstrated.



## EFFECTIVE LEADERSHIP, continued

### Club Leadership Development Culture, continued

- Board member — Visibility into the inner workings of the club. Most club Boards have a two- or three-year term, with some members rotating on and off each year. What is your club's Board rotation plan? What will you need to change, if anything, to adopt this process?
- Club President identification — Club Bylaws require the election of both a President and President- Elect in December to serve the following Rotary year (beginning July 1)
  - Many clubs also identify a President Nominee (to follow President-Elect), for a total of three years of identified forward leadership
  - Board Members and other Officers (Secretary, Treasurer) for the coming year should be elected at the same time
- All club leaders (Officers, Directors, key Committee Chairs) should be participating in available training opportunities:
  - Club Leadership Training Assembly offered by the District
  - District Foundation & Grants Training
  - Rotary Leadership Institute (RLI)
  - District Conference

Thinking about your club:

- How many years forward are Presidents identified? \_\_\_\_\_
- My successor is: \_\_\_\_\_
- His/her successor (or likely successor) is: \_\_\_\_\_
- Which of our leadership candidates have completed (or started) Rotary Leadership Institute (RLI)? \_\_\_\_\_  
<http://www.RLI33.org>
- Other sustainability strategies to consider:
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

## **EFFECTIVE LEADERSHIP**, continued

### **YOUR ROLE IN CLUB ADMINISTRATION**

- Review and update, if necessary, your club's Constitution & Bylaws.
- Create a month-by-month budget for income and expenses — **See "Budgets & Financial Management in the Resources Section (Page 12)"**
- Know the club's administrative policies and procedures (particularly as they relate to the role of the Board, the Secretary, and the Treasurer) that serve as the framework for the operation of a Rotary club.
- Prepare so that your Officers and Directors/Board Members FULLY understand their function and duties.
- Understand the reporting requirements of Rotary International and of your Rotary District. Fulfill administrative duties to your District and Rotary International.
- Prepare to make your Governor's visit the best in the District.
- Oversee the responsible stewardship of club finances.
- Understand what meetings you will lead and which ones you will delegate.
- Know and use the "best practices" for running meetings



## **EFFECTIVE LEADERSHIP**, continued

### **CLUB MEETING AGENDA (sample)**

- Opening/Welcome
- Pledge of Allegiance (optional)
- Song (optional)
- Ecumenical Invocation (optional)
- Visiting Rotarians, Guests
- New Member Introductions
- General Announcements
- Member News/Happy Bucks, etc.
- Speaker Introduction
- Speaker
- Closing Announcements/Reminders/Upcoming Events
- 4-Way Test

#### **Club Meetings**

1. Written Agenda
2. Everyone on Agenda receives in advance
3. Fit to your club and your club culture
4. Capture Visitor and Guest Names & Contact Information at Check-in

### **BOARD MEETING AGENDA (sample)**

- Opening
- Ecumenical Invocation (optional)
- Approval of Minutes, last meeting (Written minutes now required within 60 days of Board meeting per April 2016 Council on Legislation)
- Secretary's Report
- New Member Proposals
- Resignations
- Treasurer's Report
- Balance Sheet
- Income Statement
- Delinquent Members
- Committee Chair Reports
- Progress Review - Presidential Citation & Governor's Award
- Closing Announcements/Reminders/Upcoming Events

#### **Board Meetings**

1. At least Quarterly
2. Written Agenda
3. Board receives Agenda in advance
4. Board receives Minutes in advance (Written minutes required < 60 Days after mtg.)
5. Best Practice – Record the meeting for the person writing Minutes
6. Recommendation – Board Retreat before 7/1

## **EFFECTIVE LEADERSHIP**, continued

### **BUDGETS & FINANCIAL MANAGEMENT**

Are your club “financials” in good order? Does your club have a well-prepared and communicated Budget? Are there changes that should be made to your club’s budget? (Does your club have unnecessary expenses that raise the cost of Rotary membership?)

- What is YOUR ROLE in your club’s budget?
- Why is the “budget” so important?
- Has your budget been updated to reflect current RI and District dues?

#### **Budget Best Practices**

The following are items that should be considered/included in the budget and budgeting process:

- Club should have a Balance Sheet, showing all club assets (including reserves) and liabilities, updated at least monthly
- Club should have an Income Statement showing all income and expense categories, updated at least monthly
- Balance Sheet and Income Statement should be presented for Board review Monthly (minimum - Monthly to Board; Quarterly to club membership)
- Budget should include all Income/Expense line items as estimated for coming year. Look at history for two prior years when estimating.
- Budget should include allowances for expenses outside club operations, such as reimbursement of officers for attendance at District events, Training, RLI, Pre-PETS, PETS, RI Convention, etc. Ensure that club dues are sufficient to cover RI and District dues, plus operating funds for the club.
- Budget items should be monthly, as a Rotary club’s income and expenses are irregular; large expense items occurring at intervals during the year. Reserves must cover expenses between dues income intervals.
- Rotary Foundation contributions are not club cash reserves. Those funds are not the club’s funds, and should be forwarded monthly to TRF, or at a minimum, quarterly. Best practice: Have all members enroll in TRF Rotary Direct and discontinue having club treasurer collect monies for TRF. Make this a part of the New Member Orientation process for all new members.
- Assistant Governors are available to assist clubs with budgeting, if needed.



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## **EFFECTIVE LEADERSHIP**, continued

### **ONLINE RESOURCES**

Rotary Club Central: <http://www.rotary.org/ClubCentral>

Rotary Governance documents: <https://my.rotary.org/en/learning-reference/about-rotary/governance-documents>

Council on Legislation: [www.rotary.org/col](http://www.rotary.org/col)

Rotary monthly theme calendar: <https://my.rotary.org/en/news-media/calendar>

Be a Vibrant Club: Your Club Leadership Plan:  
<https://www.rotary.org/myrotary/en/document/be-vibrant-club-your-club-leadership-plan-north-america>

Rotary Brand Center: [www.Rotary.org/BrandCenter](http://www.Rotary.org/BrandCenter)

Rotary Videos: <http://vimeopro.com/rotary/rotary-videos>

Rotary Images: <http://rotary.org/images>

# MAKING THE MOST OF ROTARY’S PUBLIC IMAGE

Reference: *Lead Your Club*, 222-EN–(518), Chapter 6

## Learning Objectives

At the end of this session, participants will be able to:

- 1. Understand the purpose and intent of implementing a Public Image plan for your Rotary Club
- 2. Understand Rotary branding guidelines, use of the Rotary logo and resources available at the Brand Center  
[www.rotary.org/brandcenter](http://www.rotary.org/brandcenter)
- 3. Share proven strategies, ideas and best practices to enhance the club's (and Rotary's) Public Image
- 4. Collaborate with peers (here at PETS and at your club) on leveraging Social Media as part of Public Image plans throughout the year
- 5. Understand and incorporate Rotary's Vision Statement and Seven Causes (formerly Areas of Focus) into the club's Public Image strategies

Notes & follow-up:

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## MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

<b>Attracting Members</b>	<b>Community Awareness</b>
<b>Increase Foundation Gifts</b>	<b>Social Media Engagement</b>
<b>Traditional Media Engagement</b>	<b>Telling Your Rotary Story</b>
<b>Innovation</b>	<b>Other</b>

## **MAKING THE MOST OF ROTARY'S PUBLIC IMAGE**, continued

### **YOUR ROTARY STORY**

What will you say when someone asks, "What is Rotary?" How will you convey in your own words how Rotary helps you to JOIN LEADERS, EXCHANGE IDEAS, and TAKE ACTION?

Please answer the following questions with 3-5 bullet points each.

Why did you **join** Rotary?

- 
- 
- 
- 
- 

Why have you **stayed** with Rotary?

- 
- 
- 
- 
- 

The answers to these questions become **YOUR Rotary Story**.



## **MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued**

### **PUBLIC IMAGE STRATEGIES**

Which of these "best practices" are part of your club's Public Image plan?

- Establish a Public Image Committee and Public Image Plan
- Attend District Public Image Training opportunities
- Review all club collateral for correct use of the Rotary logo and club logo
- Review all online presence -- website, social media, blogs, etc. for correct logos and branding -- redesign as needed
- Establish a website and social media presence, if not already in place
- Prominently display the Rotary logo during service
- projects and on permanent project markers
- Post and TAG service project photos
- Budget for "Rotarian at Work" shirts for hands-on projects
- Engage local media with news releases and video posts
- Prioritize attracting members as an objective of your Public Image plan

### **IMPORTANT: Highlight Program Speakers Using Social Media**

- A few days prior to your club meeting, post about and TAG your speaker
- Post and TAG the speaker WHILE they are at your meeting
- Post a thank you within one business day, again TAGGING the speaker
- Get as many of your members as possible to follow the above 3 steps and post on their personal social media pages too
- What does this do?
  - It spreads the information out far beyond your own network
  - It showcases the great club programs your club has
  - It creates club engagement
  - Through the "viral" effect of sharing, more become aware of your club and the great work it does within the community
  - It acts as an attraction tool for future member candidates

**All of this is part of your club's Branding!**



## MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

### Rotary Branding Do's and Don'ts:

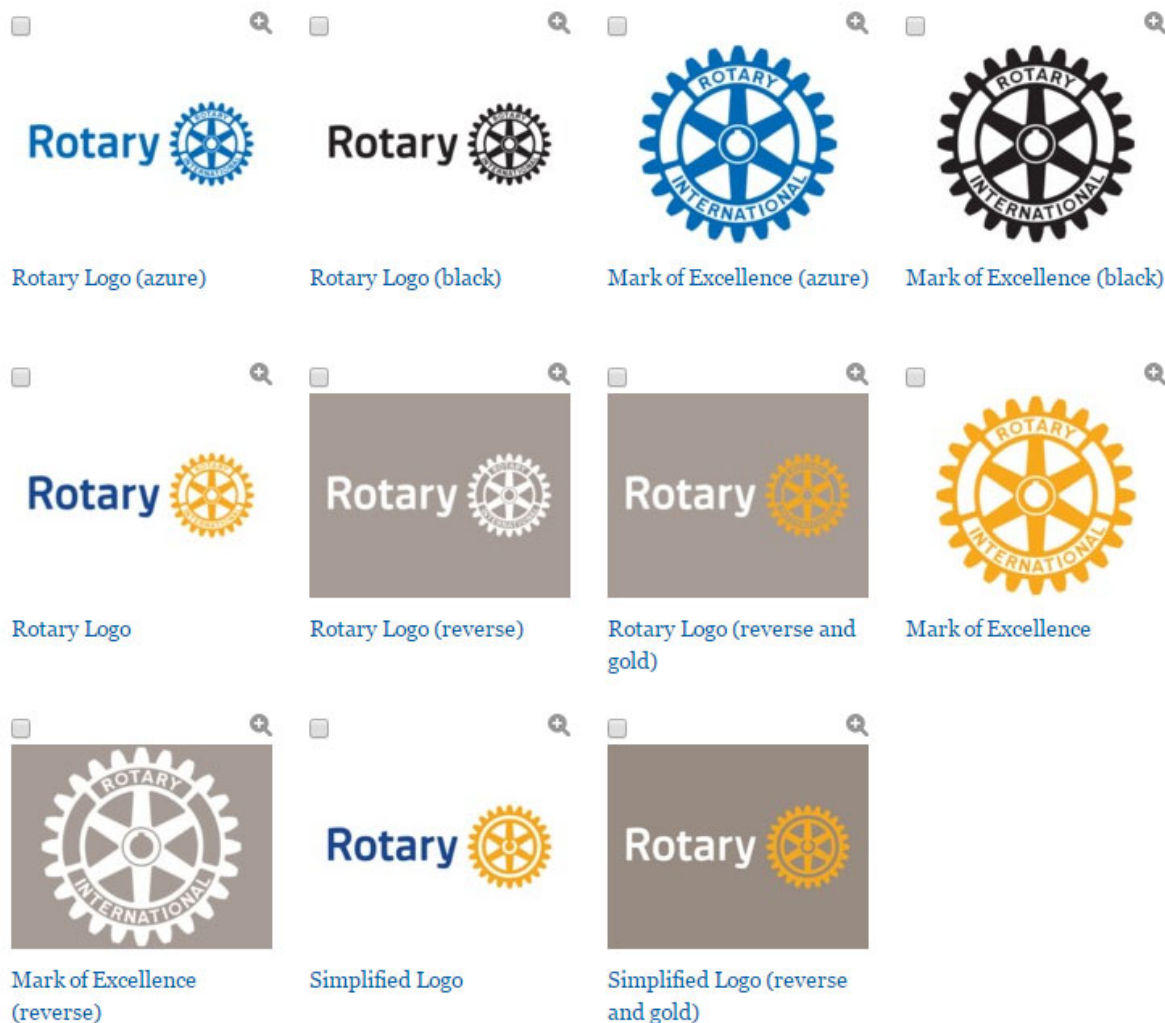
1. DON'T use the old blue & gold Rotary wheel -- anywhere
2. DO use the "Masterbrand" logo -- the word "Rotary" alongside a gold wheel (samples below)
3. DO create a Club Logo using the template in the Brand Center
4. DO use the published guidelines



<https://my.rotary.org/en/document/tell-rotarys-story-voice-and-visual-identity-guidelines-rotarians>

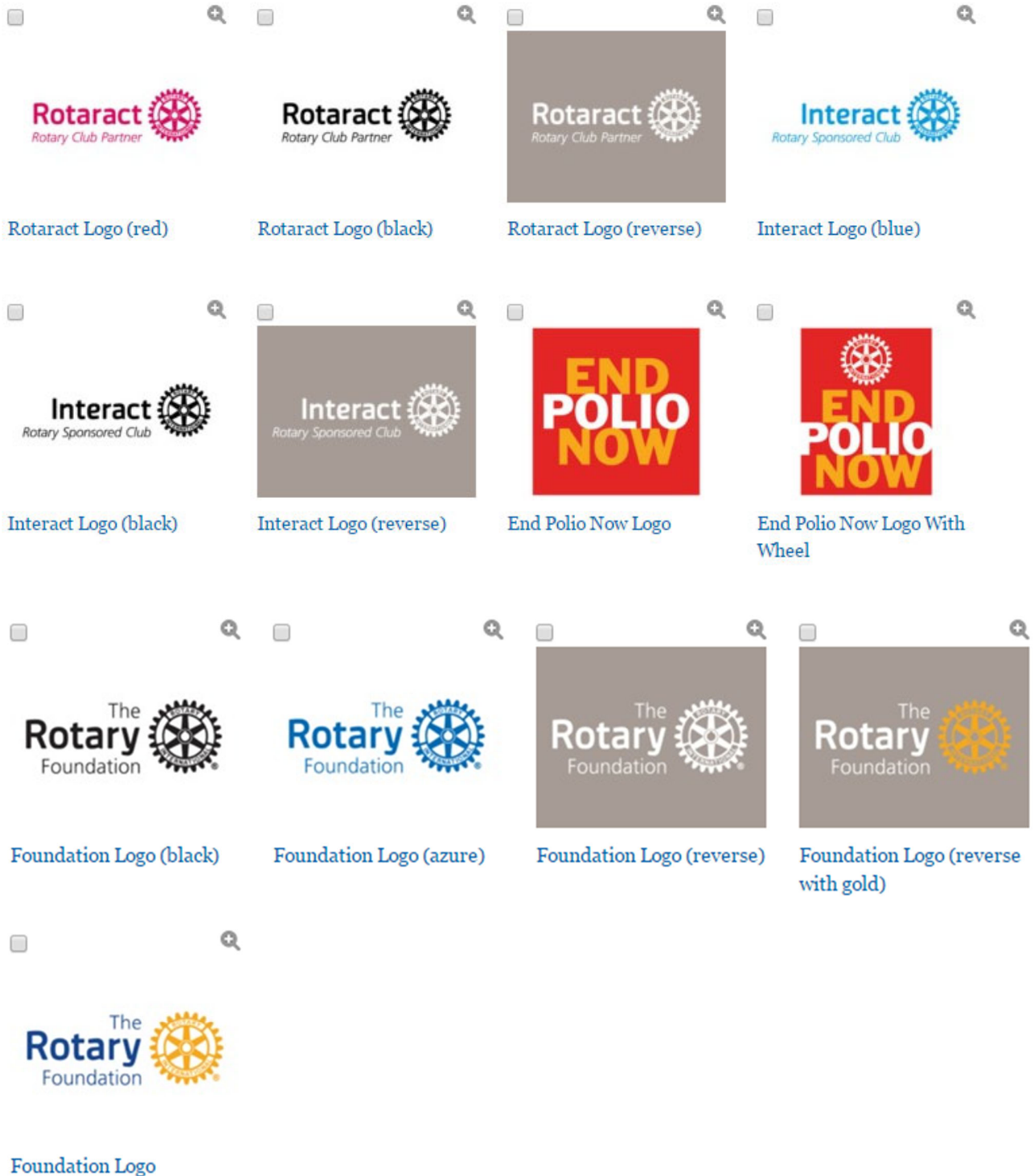
### Rotary Logos are available in many formats from MyRotary's Brand Center

<http://www.rotary.org/brandcenter>



## MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

### Rotary Logos as found in MyRotary's Brand Center





## MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

### The VISION of Rotary

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

*Uniting, Taking Action, Creating Lasting Change ... has many forms*



### The Rotary Foundation's flagship project



#### Ending polio forever

Rotary has been working to eradicate polio for over 30 years, and our goal of ridding the earth of this disease is in sight. We started in 1979 with vaccinations for 6 million children in the Philippines. Today, Afghanistan, Nigeria, and Pakistan are the only countries where polio remains endemic.

[Help us in the final push.](#)



## MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

### The Rotary Foundation's Seven Causes



Promoting Peace



Fighting Disease



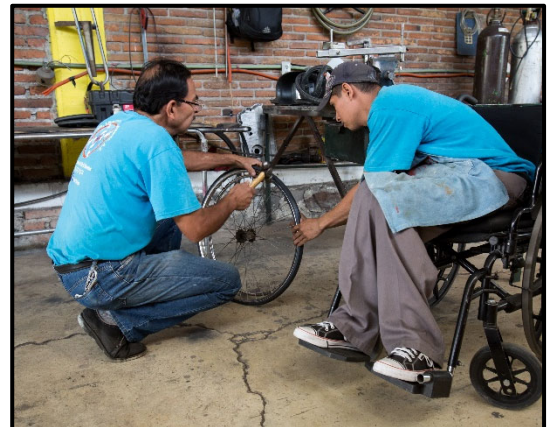
Providing Clean Water



Supporting Education



Supporting Mothers and Children



Growing Local Economies



Protecting the Environment

## **MAKING THE MOST OF ROTARY'S PUBLIC IMAGE**, continued

Great brands build their stories around simple ideas. The three phrases below convey the essence of who we are and help us tell our story with strength and consistency. They communicate what makes Rotary a positive force in communities all over the world.

### **ROTARY UNITES LEADERS**

- Rotary brings together leaders who use their combined expertise to tackle some of the toughest challenges in their communities
- Rotary harnesses the strength and experience of professional and community leaders from nearly every country in the world

### **ROTARY EXCHANGES IDEAS**

- At Rotary, we discover and celebrate our diverse perspectives during club meetings, conferences, service projects, and social events
- Rotary finds a place for your expertise and passion. Whether you want to lead a project or participate in one, Rotary welcomes your involvement.

### **ROTARY TAKES ACTION**

- Rotary creates positive change in communities around the world through our service projects
- From stocking food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out impactful and sustainable projects in communities around the world

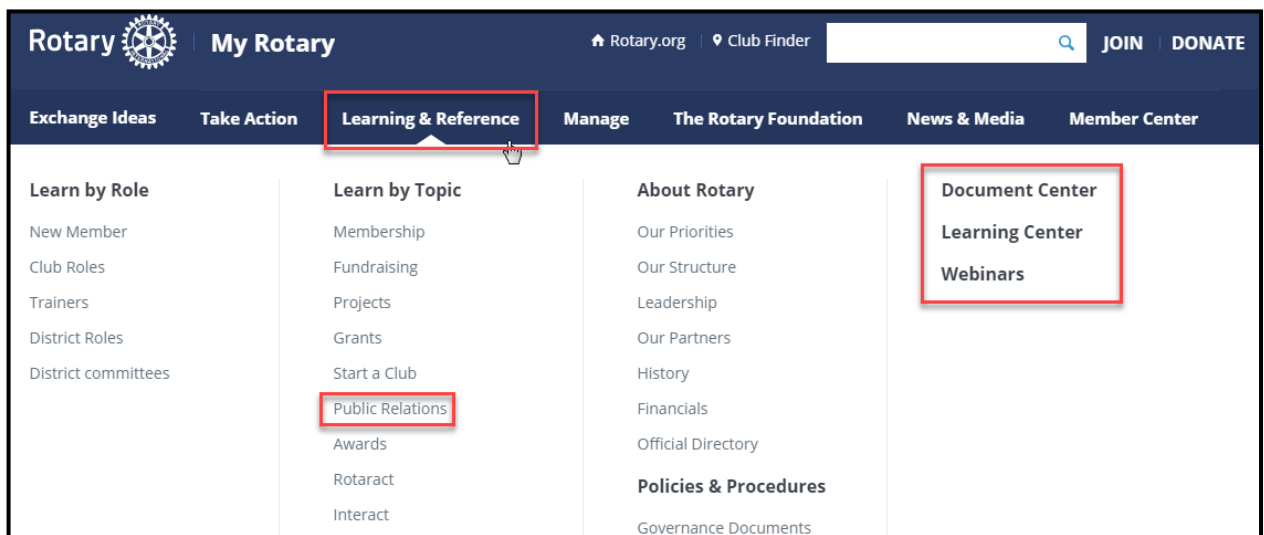
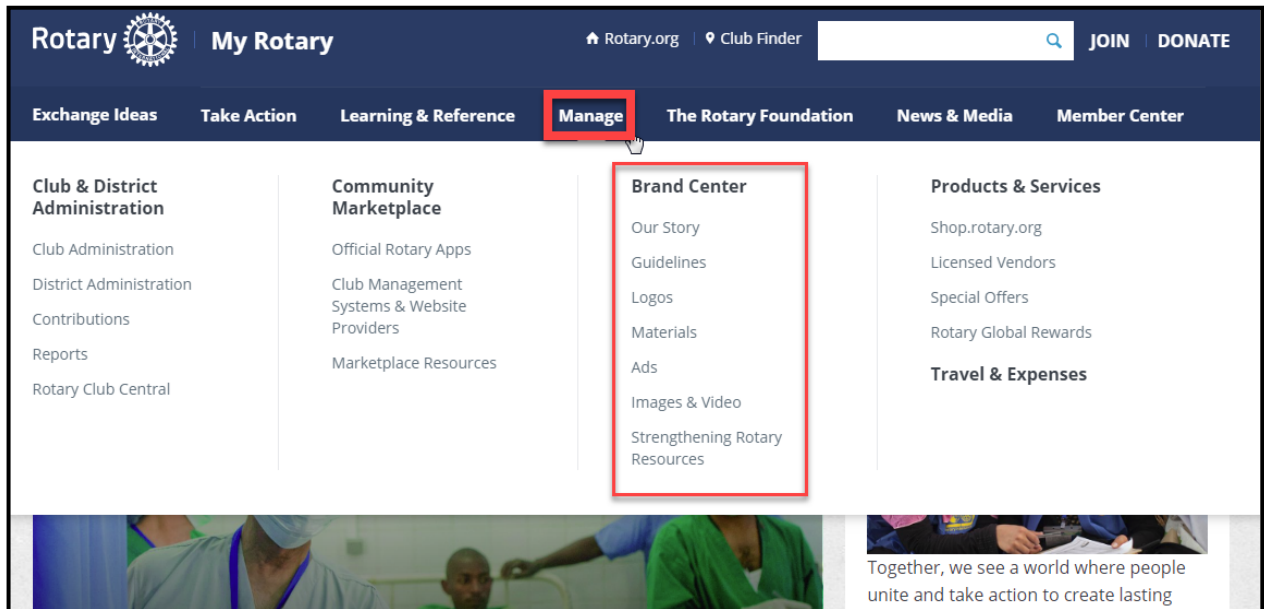
### **THROUGH ROTARY**

- We build lifelong relationships
- We honor our commitments
- We connect diverse perspectives
- We apply our leadership and expertise to address social issues



## MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

### References, Resources, Tools and Support



End Polio Now: <http://www.EndPolioNow.org>

Club Public Image Committee

District Public Image Committee

Rotary Public Image Coordinator (RPIC) and their assistants

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## ENGAGING YOUR COMMUNITY

Reference: *Lead Your Club*, 222 EN–(518), Chapter 8

### *Learning Objectives*

At the end of this session, participants will be able to:

1. Identify the ingredients of an effective community-building service project that helps to tell Rotary's story
2. Determine a balanced program of service for the club
3. Understand the difference between a fundraising project and the service project(s) it funds
4. Understand the role and importance of YOUR leadership and commitment in your club's service projects
5. Understand the importance of periodically evaluating every club project
6. Identify the "best practices" of successful and effective club projects

Notes & follow-up:

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## ENGAGING YOUR COMMUNITY, continued

<b>Identifying Community Needs</b>	<b>Projects Should Assist in Attracting &amp; Retaining New Members</b>
<b>Rotary's Public Image Should Always be a Factor</b>	<b>Determining Whether A Project Is A Good "Fit" For Your Club</b>
<b>Insuring Club Support/Participation</b>	<b>Involving Members &amp; Committees</b>
<b>Partnering With Another Organization</b>	<b>Evaluating A Completed Project</b>

## ENGAGING YOUR COMMUNITY, continued

### OBJECT OF ROTARY

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

**FIRST:** The development of acquaintance as an opportunity for service;

**SECOND:** High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

**THIRD:** The application of the ideal of service in each Rotarian's personal, business, and community life;

**FOURTH:** The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

Notes & follow-up:

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## ENGAGING YOUR COMMUNITY, continued

### AVENUES OF SERVICE

We channel our commitment to service at home and abroad through five **Avenues of Service**, which are the foundation of club activity:

**Club Service** focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.

**Vocational Service** calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society. Learn more in *An Introduction to Vocational Service* and the *Code of Conduct*.

**Community Service** encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest. Learn more in *Communities in Action: A Guide to Effective Projects* and this Community Service presentation (PPT).

**International Service** exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.

**Youth Service** recognizes the importance of empowering youth and young professionals through leadership development programs such as Rotaract, Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.

Notes & follow-up:

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## ENGAGING YOUR COMMUNITY, continued

### KEY POINTS

- We are **“People of Action”** — We identify needs in our communities, create solutions, then fund and execute service projects (fundraisers are a means to an end - not an end in themselves)
- While we are a Membership Organization first and foremost, our “business” is service -- thus “Service Above Self” is Rotary’s principal motto
- Every Rotarian is tasked with the responsibility for finding ways to improve the quality of life in his or her community and around the world through service projects
- Service projects provide opportunities for both member and community involvement and fellowship
- Effective, meaningful service projects are essential to attracting and retaining Rotarians
- Service projects are also a part of your club’s public image and the image of Rotary International

### **A successful service/community-impact project requires the following steps:**

- Conduct a needs assessment to determine the needs and concerns of the community. Projects repeated for many years can lose effectiveness and community impact.
- Develop a plan to ensure the project will be meaningful and successful
- Implement the project to deliver the service
- Evaluate current projects to plan for future projects, learning from the successes and the failures; evaluation should be a part of all stages, from project planning to implementation and post-project review
  - Does the need for the project still exist?
  - Are members still passionate about the project?
  - Who/what would be harmed if we dropped or reinvented the project?



## ENGAGING YOUR COMMUNITY, continued

### Community Engagement Resources

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the Official Directory and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org).

The following resources are available to help you conduct successful service projects. They can be found from the Lifecycle of a Project webpage on MyRotary. MyRotary → Take Action → Develop Projects → Lifecycle of a Project.

*Communities in Action* (605a-EN) — Provides comprehensive instructions for planning, conducting, and evaluating a service project.

*Community Assessment Tools* (605-EN) — Provides comprehensive details for how to conduct community assessments.

*Lead Your Club: Service Projects Committee* (225d-EN) — A comprehensive manual for your club's Service Projects Committee.

*Rotary Showcase User Guide* — This guide will teach any Rotarian what Rotary Showcase is and how to use it effectively. It includes an anatomy of an efficient Showcase project including some featured past projects.

*Rotary's Areas of Focus* (965-EN) — Provides excellent examples of service projects in each of Rotary's Six Areas of Focus

### Human Resources

Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.

MyRotary – Visit EXCHANGE IDEAS → COMMUNITY MARKETPLACE to find Rotarians and Rotaractors who are developing innovative resources that help clubs and districts connect with each other.

MyRotary – Visit EXCHANGE IDEAS → DISCUSSION GROUPS to find a group that is discussing projects that you may want to emulate, or learn from, or even extend.

Rotarian Action Groups — International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to conduct international service projects related to a specific topic.

## **ENGAGING YOUR COMMUNITY**, continued

### **Informational Resources**

Club Central — Club assessment and goal-setting tools used to plan service project goals. Via the RI website and through new Webinars, learn more about the system and how it can help your club plan for your year.

*Club Assessment Tools* (808-EN) — A companion piece to the Membership Development Resource Guide

RI programs newsletters — E-newsletters on specific RI programs. Sign up at <http://www.rotary.org/newsletters/>

*Rotary Community Corps Handbook* (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders; also includes case studies and project ideas.

*The Rotary Foundation Quick Reference Guide* (219-EN) — A detailed overview of the programs and services of The Rotary Foundation.

*World Community Service Handbook: A Guide to Action* (742-EN) — Information on the WCS program, including overviews of donations-in-kind projects and the Rotary Volunteers program, as well as Rotary Foundation grants.

*Abuse and Harassment Prevention Training Manual / Leaders' Guide* (775-EN) — Youth protection guidance that can be modified to comply with local laws and situations to create and maintain the safest possible environment for participants.

### **Financial Resources**

Funds from individual donors or local businesses

Rotary Foundation grants and grants from other foundations

Funds solicited through the <http://Ideas.Rotary.org> database



## YOUR ROTARY FOUNDATION

Reference: *Lead Your Club*, 222 EN (518), Chapter 7

### *Learning Objectives*

At the end of this session, participants will be able to:

1. Identify the seven Causes of Rotary Foundation and how they relate to Rotary Foundation grants
2. Understand how your club can benefit from District Grants and participate in Global Grants
3. Identify the “best practices” of clubs that successfully grow member support and contributions to The Rotary Foundation
4. Understand how to use historical club contribution data to set reasonable goals for both Annual Fund and PolioPlus fundraising
5. Understand how to use available informational and District resources to educate members on The Rotary Foundation's goals, accomplishments and value as their “charity of choice”

Notes & follow-up:

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## **YOUR ROTARY FOUNDATION**, continued

**Motto:** “Doing Good in the World”

**The Rotary Foundation’s Mission Statement:**

... to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty

**YOUR Rotary Foundation has seven specific Causes:**

Promoting Peace

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Fighting Disease

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Providing Clean Water

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Saving Mothers and Children

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Supporting Education

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Growing Local Economies

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Protecting the Environment

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<https://www.rotary.org/en/learning-reference/about-rotary/areas-focus>



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## YOUR ROTARY FOUNDATION, continued

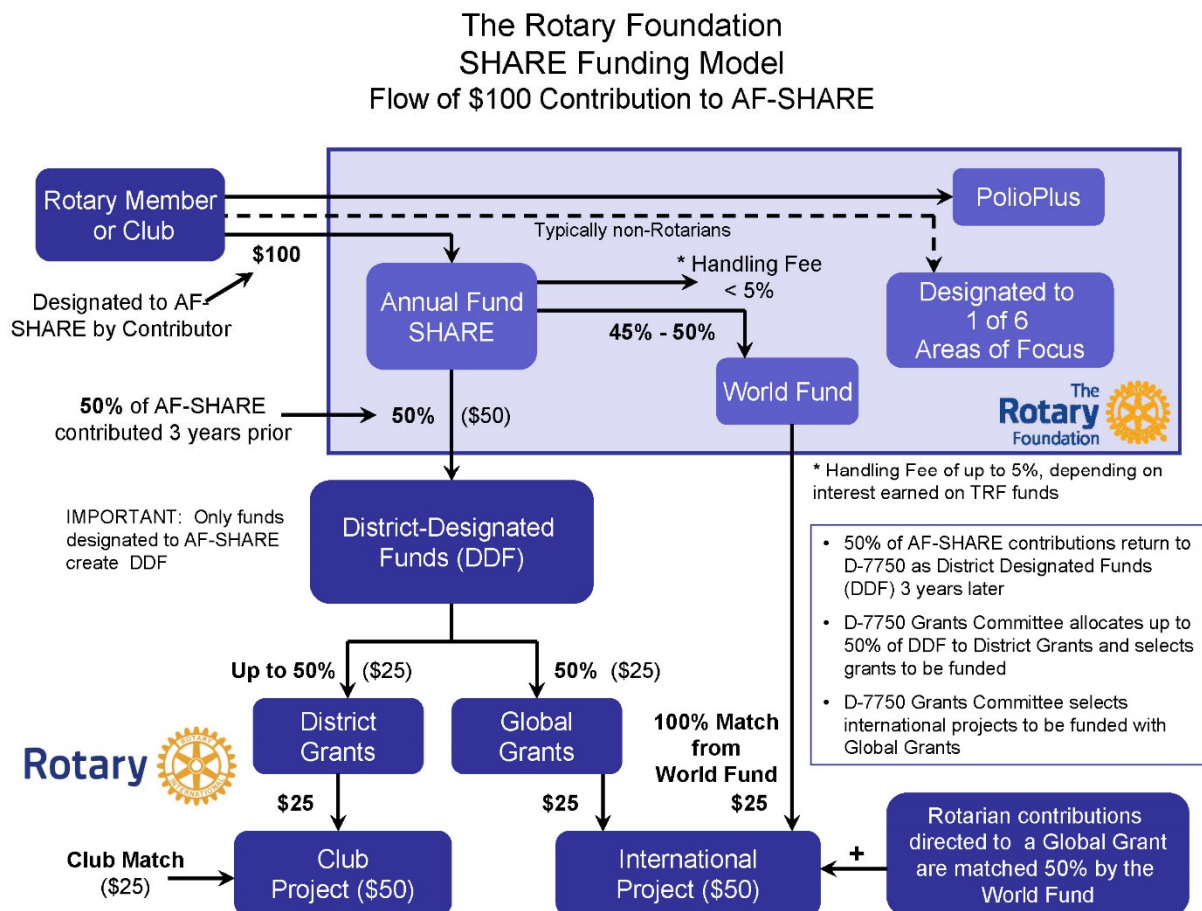
### What are the big differences between The Rotary Foundation and other charitable foundations?

- Rotary's Vision Statement (not TRF's)
  - “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 Members
  - People of Action
- Grants from the Rotary Foundation are initiated by
  - A Rotarian who sees a community need and creates a solution
  - A Rotary club that supports the project
  - Rotarians who agree to execute the project

Then,

  - The Rotary Foundation **funds** the project
  - The Rotarians monitor, evaluate, and report on the project
- Grants from The Rotary Foundation are initiated and directed by Rotarians, Rotary clubs and Rotary Districts. Therefore:
  - You know where your contributions are going
  - Rotarians “have your back” on the project (monitoring, evaluation)
  - Required reporting ensures funds are spent as intended
- Clubs' and Districts' grant eligibility and available funding is based on their club members' contributions to The Rotary Foundation
- What kinds of grants are available from The Rotary Foundation?
  - District Grants
  - Global Grants

## How are District and Global Grants funded by Rotarians' contributions?



### Ideas for my club's District Grant requests:

[illegible]



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## YOUR ROTARY FOUNDATION, continued

### District Grants - Characteristics and guidelines

- **IMPORTANT:** District grants for your term as President will be made BEFORE July 1. Get a grant application underway ASAP if not already in process
- Awarded to your club by your District's Grants Committee, based on District guidelines (get with your District Foundation Chair soon to learn more)
- Simple, flexible, innovative
- Small-scale, short-term (<1 year)
- Awarded annually by your District
- Administered by your District

### District Grants - Requirements

- Clubs may spend the money and start the project only AFTER receiving grant funds
- Provide a project report, including use of funds
- Provide receipts for expenditures

### Global Grants - Characteristics and guidelines

- Longer-term projects in partnership with clubs and districts in other countries
- Align with one or more of the Seven Causes
- Active Rotarian participation by in-country (receiving) Rotary clubs
- \$30,000 minimum budget
- Sustainable and measurable outcomes

**NOTE:** Global Grants can be (and are) made in the US, supported by a District outside the US. A sufficiently "big idea" is needed to meet the criteria above.

## YOUR ROTARY FOUNDATION, continued

### Promoting The Rotary Foundation in your club

- Identify a committed member as the club Foundation Chair
  - Select committee members who have supported the Foundation
- **Lead** by example — attend and encourage attendance at your district Rotary Foundation seminars and other related events
- **Lead** by contributing personally and encourage your Board of Directors to do likewise
- Promote contributions from club members
  - Include recommended Sustaining Member contribution (\$100/year) on dues invoice
  - Paul Harris Level Point Match offers
  - Rotary Direct — Regular contributions via bank draft or credit card
- Plan educational and inspirational club programs focused on The Rotary Foundation every quarter (especially in November, Rotary Foundation Month)
- Utilize District Rotary Foundation resources for support
- Set club contribution goals and track them in Rotary Club Central
- Available Reports:
  - **Monthly Contribution Report** (overall club progress)
  - **Club Recognition Summary** (Individual giving)

My club's strategies for promoting contributions to The Rotary Foundation:

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## YOUR ROTARY FOUNDATION, continued

### Donor Recognition Levels

Paul Harris Fellow (PHF)	\$1,000 lifetime contribution
Sustaining Member	\$100 year
Paul Harris Society	\$1,000/year
Multiple Paul Harris Fellow	\$1,000 add'l increments: PHF+1, PHF+2, etc
Major Donor	\$10,000 lifetime contribution (Level 1)
	\$25,000 (Level 2)
	\$50,000 (Level 3)
	\$100,000 (Level 4)
Arch Klumph Society	\$250,000 minimum (multiple levels)

### Club Banner Recognition Levels

100% Foundation Giving Club

Everyone > \$25 to Annual Fund, PolioPlus Fund, approved global grants, or Endowment Fund

**and** club Per Capita > \$100

Every Rotarian, Every Year Club

Everyone > \$25 to Annual Fund

**and** club Per Capita > \$100

100% Paul Harris Fellow – All members are Paul Harris Fellows (one time)

### Estate Pledge (Bequest) Levels

Benefactor	\$1,000 Estate pledge
Bequest Society	\$10,000 Estate pledge (Level 1)
	\$25,000 Estate pledge (Level 2)
	\$50,000 Estate pledge (Level 3)
	\$100,000 Estate pledge (Level 4)
	\$250,000 Estate pledge (Level 5)

## YOUR ROTARY FOUNDATION, continued

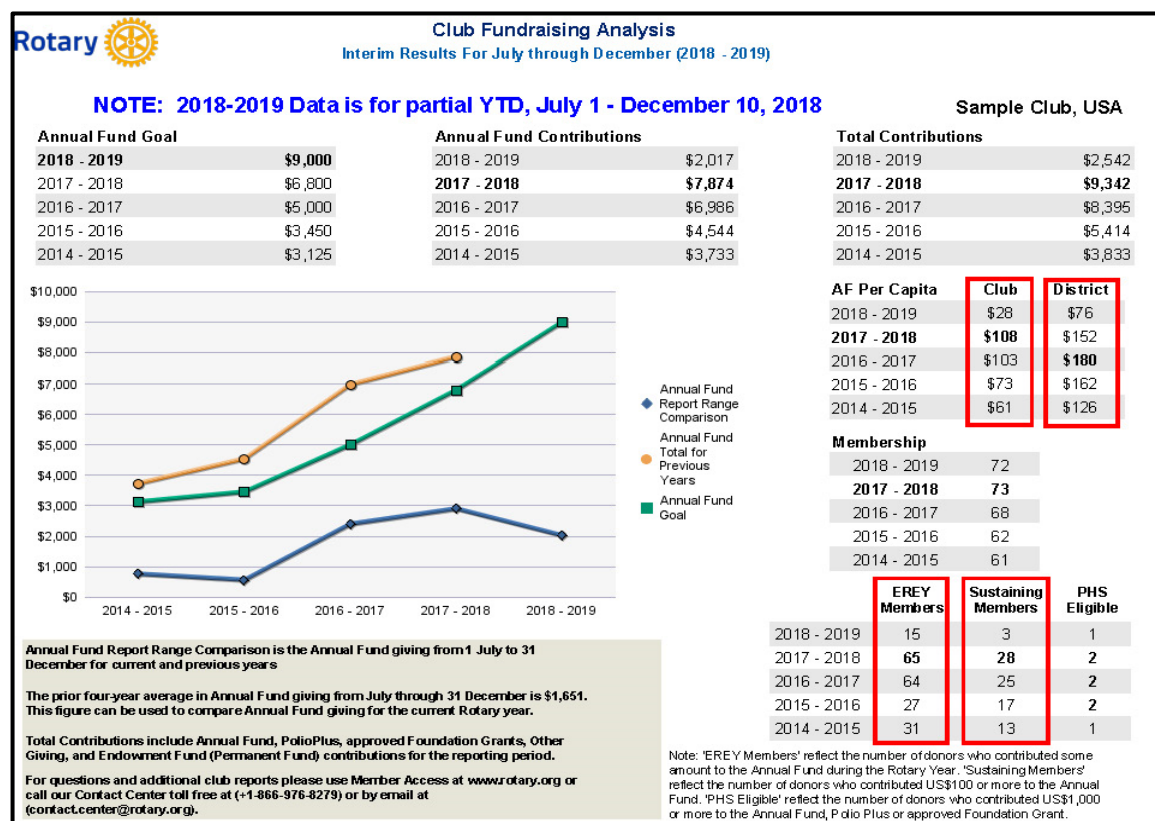
### Goal Setting — Annual Fund

All necessary data for the goal-setting process described below is on the **Club Fundraising Analysis**, available from My Rotary - Reports

OR: [tinyurl.com/PETSFoundationReports](http://tinyurl.com/PETSFoundationReports)

- Consider the club's historical giving levels
  - Per capita Annual Fund (based on July 1 membership)
  - Total Giving (based on Rotary year)
- If your club's per capita giving is below the District average:
  - Set your goal at the District average OR
  - Close the gap by half
- If your club's per capita giving exceeds the District average:
  - Take the best of your past five years' per capita and beat it by \$1.
  - Your club's Total Giving goal for the Annual Fund is the per capita goal times your estimated July 1, 2020 membership

### Club Fundraising Analysis (available from My Rotary - Reports)





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## YOUR ROTARY FOUNDATION, continued

### Goal Setting — PolioPlus

Your club's PolioPlus contribution history is in the PolioPlus report (available from My Rotary - Reports) OR: [tinyurl.com/PETSFoundationReports](https://tinyurl.com/PETSFoundationReports)

For the seven Districts in Carolinas' PETS as a whole, the PolioPlus goal is \$35 per capita. Your District's per capita goal may be higher (substitute for \$35 below).

- Consider the club's historical giving levels
  - Per capita (based on July 1 membership)
  - Total Giving (based on Rotary year)
- If your club's per capita giving is below \$45:
  - Set your goal at \$45 OR
  - Close the gap by half
- If your club's per capita giving exceeds \$45:
  - Take the best of your past five years' per capita contributions and beat it by \$1.
- Your club's Total Giving goal for PolioPlus is the per capita goal times your estimated July 1, 2020 membership

Notes:

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<b>Motto &amp; Mission</b>	<b>Seven Causes</b>
<b>How are Grants Initiated?</b>	<b>Grant Types</b>
<b>Foundation Committee, Personal and Board Example</b>	<b>Promoting YOUR Foundation</b>
<b>Recognizing Members for Their Foundation Support</b>	<b>Goal Setting</b>



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## YOUR ROTARY FOUNDATION, continued

### Resources

“What other Rotary Foundation resources are available?”

- Your District Rotary Foundation chair and committee
- Your District Rotary Foundation Seminar (**PLAN NOW TO GO**)
- Your District Grant Seminar (President-Elect and Foundation Chair-Elect should attend)
- Your District Governor and Assistant Governors
- Your Regional Rotary Foundation Coordinator
- Your Rotary Foundation staff at RI World Headquarters

The following are suggested as informational club resources:

- *The Rotary Foundation Reference Guide*, 219 EN—(1117)  
<https://my.rotary.org/en/document/rotary-foundation-reference-guide>
- [www.rotary.org/myrotary/en/rotary-foundation](http://www.rotary.org/myrotary/en/rotary-foundation)  
(become familiar with all links and sub links on this page)
- E-learning modules  
<https://my.rotary.org/en/learning-reference>
  - Rotary Foundation Basics
  - Rotary Foundation’s Six Causes and Choosing a Grant

## **MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT**

Reference: *Lead Your Club*, 222 EN (518), Chapter 5

### *Learning Objectives*

At the end of this session, participants will be able to:

1. Understand the relationships between Retention, Attrition and Attraction Rates
2. Understand the four Key Success Factors of membership growth:
  - Prospect Identification (Lead Generation)
  - Attracting Members
  - Onboarding New Members
  - Retaining Members
3. Identify one or more Intentional Strategies to accomplish each of the four membership Key Success Factors
4. Understand 2016 Council on Legislation (COL) flexibilities, including:
  - Meeting Flexibility
  - Alternate Membership Types
  - Satellite Clubs
5. Share proven “best membership practices” for communicating with and engaging potential, new, and current members
6. Leave PETS with the framework of an effective Club Membership Growth Plan



## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

<b>Retention, Attrition &amp; Attraction</b>	<b>Prospect Identification (Lead Generation)</b>
<b>Attracting Members</b>	<b>Onboarding New Members</b>
<b>Engaging Members</b>	<b>COL Flexibilities</b>

Notes & follow-up:

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## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

### The Benefits of Being a Member of Rotary!

- A high quality, high integrity network of like-minded people
- Opportunity to serve your own community and others worldwide
- Part of something bigger than yourself
- Personal growth & development, particularly in leadership skills
- Outstanding programs from high-impact speakers
- Mentoring youth or younger members or being mentored yourself
- Rotary Global Rewards (<https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>)

### An Effective Rotary Club is One That:

- **Sustains or increases its membership base**
- Implements successful projects that address the needs of its community and communities in other countries
- Supports the Rotary Foundation through both program participation and financial contributions
- Develops future club leaders capable of serving Rotary beyond the club



**Essential**

**KEY POINTS:** A vibrant, active Club Membership Committee and a Club Trainer can greatly assist your club in achieving its goals!

Notes & follow-up:

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## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

### RETENTION, ATTRITION AND ATTRACTION

**Fact:** Clubs lose and attract members every year (Attrition is Real)

- **Retention Rate** = % of members retained in a given year
  - Example: 40 member club retains 34 members = 85% Retention rate
- **Attrition Rate** = % of members lost (resigned) in a given year
  - Example: 40 member club loses 6 members = 15% Attrition rate
- **Therefore: 100% - Retention Rate = Attrition Rate (100% - 85% = 15%)**
- **Attraction Rate** = % of new members attracted (added) in a given year
  - Example: 40 member club adds eight members = 20% Attraction rate

Attraction Rate must exceed Attrition Rate to grow membership

### District Membership Trends through 7/1/2019

Look closely at the data for your District

District	7/1/15	7/1/16	7/1/17	7/1/18	7/1/19	3-yr Attrition	Avg. Attrition Rate	Annual Avg. Attrition	Avg. Attraction Rate	New Mbrs Per Yr.	Avg. Gain/Loss
7670	2191	2198	2197	2181	2224	-926	14.0%	308.7	14.4%	317.3	8.7
7680	2737	2682	2670	2630	2611	-1157	14.6%	385.7	13.7%	362.0	-23.7
7690	2594	2579	2489	2506	2477	-1025	13.5%	337.1	12.2%	303.1	-34.0
7710	1877	1942	1936	1963	1997	-871	14.8%	290.3	15.7%	308.7	18.3
7720	1516	1523	1495	1513	1463	-627	14.0%	209.0	12.7%	189.0	-20.0
7730	1853	1839	1850	1821	1825	-763	13.9%	254.3	13.6%	249.7	-4.7
7750	2630	2658	2656	2654	2648	-1230	15.5%	410.0	15.3%	406.7	-3.3
Totals	15398	15421	15293	15268	15245	-6599	14.4%	2199.7	14.0%	2141.0	-58.7
	-69	23	-128	-25	-23						
	3- Yr Avg.		-58	-43	-59						

Notice that Districts with net membership GAINS attracted a lot of members, but just barely enough to grow. Why did they not attract more?

Also notice that Districts with net membership LOSSES attracted a lot of members, but just not quite enough to grow. Why did they not attract more?

Across all seven Carolinas' PETS Districts, market limitations can't explain this.

**Possible Conclusion:** Most clubs will work just hard enough at membership to maintain their size, or decline by one or two members/year if surprised by a late resignation. Clubs are simply satisfied to just maintain or slightly decline in membership.

Is your club one of those clubs?

## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

### Five Things I Wish All Rotarians Knew (and Believed) About Membership

1. **Nothing Else Matters** — Rotary is a Membership Organization And Our Product is Service — If you get Membership right, pretty much everything else takes care of itself. If you don't get membership right, everything else is a struggle for the whole year. Work on membership first, get your membership committee up and running first, and then attend to other priorities. Make sure your membership chair is 100% committed to membership growth, and to getting started in April or May (the April or May before the next Rotary year). And that the Membership Chair has a committee. NOTE: A committee cannot be one member!
2. **Attrition is Real** — Membership organizations lose members, most at alarming rates. I know, you're thinking "Nobody would quit our great club". Wrong. The three-year average annual attrition rate for Zone 33 clubs is fourteen percent (14%) annually. Half of those leave for reasons you can't control. A handful of clubs have long-term attrition rates below 10% and none lower than 8%. Build your membership plan around the assumption that 15% of your members will leave during this next Rotary year, and have a plan to replace them. Count your blessings (and your membership gain) if that doesn't happen.
3. **Retention is Important for the LONG Term** — Retention rates can be changed over time, not quickly, and you can't retain your way from 20 to 30 members. Work on retention strategies, but don't count on moving the needle quickly. Find out why people leave through exit surveys, and fix those problems. Hint: Most attrition casualties have been members less than 1, 2 or 3 years (<1 year = highest attrition). Focus your retention strategies on those members.
4. **Clubs need membership growth every year** — It doesn't have to be dramatic. 4% annual membership growth will double the size of your club in 18 years. What you want to develop is a membership growth culture -- the fundamental belief that the club grows a little every year and avoids huge declines along the way. It's not a series of "membership drives", but a consistent, sustained effort. We have examples of clubs doing just this, with only one year of decline (by 1 member) along the way. Set your goal at 10% net membership growth (plus an estimate of 15% attrition).
5. **It takes Intentional Strategies** — Discard generalities like, "Ask members to bring guests to meetings". Change that to, "Ask "x" members to bring "y" guests to a meeting about Rotary membership on mm/dd/yyyy", and you might have something, if the rest of the plan for reminders, follow up, etc. is in place. Lather, rinse, repeat.

Likewise, financial and other incentives for membership recruiting are surprisingly ineffective.

Remember the 10:3:1 Rule -- It takes about 10 names or referrals (suspects) to get 3 prospects to a Rotary Information Hour or Rotary club meeting, to get 1 new member proposal. Lack of sufficient "lead generation" is a root cause of low rates of new member flow.

If you understand and believe these truths, your year as President will be successful, rewarding and perhaps legendary in the life of your club.





## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

### INTENTIONAL MEMBERSHIP STRATEGIES

#### Prospect Identification (Lead Generation)

##### 10:3:1 Rule

- 10 targets (conversations)
- 3 Prospects (to a meeting)
- 1 Member

1. Use the “[Who do You Know?](#)” handout at a Club Assembly. Actually allow time for people to fill it out (making it clear we're not leaving 'till everyone has some names written down) and then ask them to approach ten of those people about Rotary.
2. **Classification/Profession Gap Analysis** — Secure a list of local businesses and professions from the Chamber of Commerce and/or list sources like InfoUSA or ZoomInfo (available at your local Library). Identify businesses and professions that ought to have someone in Rotary. Present the list at a Club Assembly and ask which members know someone at each and who will invite them to an upcoming Rotary Information Hour (#4 below).

#### Attracting Members

3. **Club President personally asks each member** to bring a new member into the club -- an eyeball-to-eyeball conversation over breakfast, lunch, coffee, adult beverage or a two-way telephone conversation. Takes the anonymity out of the ask. “Can I count on you doing this not only for the club but also for me?”
4. A regularly-scheduled “**Rotary Information Hour**” once a quarter or once a month. The “intentional” part is that it’s a standing event, on the club calendar, and members are reminded by email or phone to bring their prospective members. Not just to a meeting whenever you think of it, but to a regularly scheduled date, time and place.  
See: [Recipe for a Successful Membership Event](#)
5. “**Drip Marketing**” -- Create a central prospect list, including email addresses, and use the “Potential Member” feature in DaCdb or another email distribution mechanism (Vertical Response, Constant Contact or MailChimp), to send your club’s E-Bulletin once or twice a month to your entire prospect list. Regularly reminding prospects of your club's brand makes you “Top of Mind” when the time is right for the prospect to join a community service organization. Be sure and include “Response” information so they know how to raise their hands when they're ready.  
See: [Don't Squander Your Leads](#)

#1 PROVEN ROI Strategy

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## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

### INTENTIONAL MEMBERSHIP STRATEGIES, continued

6. **Take advantage of 2016 Council on Legislation** flexibilities, such as:
  - a. Create a Corporate Membership category, allowing multiple people from a company to become Rotarians, with one being the “Corporate Active” member and the others “Corporate Associates”
  - b. Create a “YP-35” membership category that follows the “Rule of 85” dues, meals and attendance structures
  - c. Create Satellite club(s) for groups of members that have a different need or focus from the standard club
  - d. Get creative. Put actions in place that are relevant for your club
  - e. <https://www.rotary.org/myrotary/en/club-flexibility>

### Onboarding New Members

7. Create a **New Member Orientation** program and process to engage members immediately in your club. Early engagement is the key success factor in retention. To follow up your New Member Orientation, use the [New Member Scavenger Hunt](#) for a fun way to get members engaged in learning more about Rotary and about your club.

### Retaining Members

8. **Upgrade Programs** — Clubs have proven that the club experience (including great programs) is what attracts and keeps members. Programs need to be informative, educational or inspirational (or a combination thereof). Limit or avoid programs by other non-profits (members see those as fundraising requests) unless there is a value proposition for your club.
9. **Mentorship** — Create a mentorship plan to assign an experienced member to work with a new member. Mentors help new members get acquainted and engaged with existing members.
10. **Meaningful Service Projects** — The bottom line of engaging and retaining members is for the club to do meaningful, **Rotary-branded** service projects of its own (not writing checks to other non-profits). Hands-on, shoulder-to-shoulder service work is where members get to know and bond with each other.

**HOPE is NOT a Strategy**



## MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

### Club Membership Growth Plan

**Membership Goal** -- Grow by \_\_\_\_\_ members (net), requiring \_\_\_\_\_ new members

**Our Membership Challenges** -- What are the membership challenges facing our club?

☐ High Attrition rate? ☐ Low Attraction Rate? ☐ Maintaining existing growth momentum?

**Actual Club Data at:** <http://RIZones33-34.org/Zone33MGI> (page down to your District/Club)

**Prospect Identification (Lead Generation)** -- What is our plan for prompting members to think of candidates AND for inspiring members to contact them?

Intentional strategy(ies) we will use:

Who's responsible/accountable?

**Attracting Members** -- How will we make our club attractive to prospects? How will we tell the Rotary story?

Intentional strategy(ies) we will use:

Who's responsible/accountable?

**Onboarding New Members** -- How will we ensure that new members understand Rotary, our club, expectations and opportunities for service?

Intentional strategy(ies) we will use:

Who's responsible/accountable?

**Retaining Members** -- How will we improve our club experience so members want to remain in Rotary? How will we make our service projects more compelling for our members?

Intentional strategy(ies) we will use:

Who's responsible/accountable?

## **MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT**, continued

### **Resources and References**

The following are suggested informational club resources; they are valuable tools that come from the Rotary International website:

- Chapter 5 of *Lead Your Club: President* (EN-518 Edition)
- Rotary Club Central  
<https://www.rotary.org/clubcentral>
- *Get More Out Of Membership: Connect For Good*  
<https://my.rotary.org/en/document/connect-good>
- *Strengthening Your Membership: Creating Your Membership Plan*  
<https://my.rotary.org/en/document/strengthening-your-membership-creating-your-membership-plan>
- Membership Assessment Tools  
<https://my.rotary.org/en/document/membership-assessment-tools>
- Membership section of MyRotary Learning Center  
<https://my.rotary.org/en/learning-reference/learn-topic/membership>
- *New Member Orientation: A How-to Guide for Clubs*  
<https://my.rotary.org/en/document/introducing-new-members-rotary-orientation-guide>
- Rotary Basics (such as the ABC's of Rotary)
- Rotary Awards  
<https://my.rotary.org/en/learning-reference/learn-topic/awards>
- Rotary Global Rewards Program  
<https://my.rotary.org/en/member-center/rotary-global-rewards/offers>
- Rotary Newsletters  
<http://www.Rotary.org/newsletters>



## RI MEMBERSHIP RESOURCE GUIDE, November 2019 Edition

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, or ordered on [shop.rotary.org](http://shop.rotary.org) with the SKU number provided. If you experience any trouble when placing your order, please email [membershipdevelopment@rotary.org](mailto:membershipdevelopment@rotary.org) or [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org).

PUBLICATIONS			
Name	Description	Audience	Available
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 417)
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 808)
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 414)
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 245A)
<a href="#">Connect for Good</a>	Eight-page guide shows how to get involved and connect with Rotary.	Current members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 595)
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 699)
Impact Begins With You	This prospective member brochure explains who we are and what sets us apart from other organizations.	Prospective members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 001)



LEARNING CENTER: ONLINE COURSES			
Name	Description	Audience	Available
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
<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="http://rotary.org/learn">http://rotary.org/learn</a> (log in My Rotary account required)
Alumni Report Guide	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	<a href="https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report">https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report</a>



TOOLS			
Name	Description	Audience	Available
<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="https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices">https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices</a>
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 2540)
<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="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 801)
<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="https://brandcenter.rotary.org/">https://brandcenter.rotary.org/</a>

RESOURCES			
Name	Description	Audience	Available
<b>New!</b> <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="https://my.rotary.org/en/document/club-membership-committee-checklist">https://my.rotary.org/en/document/club-membership-committee-checklist</a>
<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="https://www.rotary.org/en/engaging-younger-professionals-toolkit">https://www.rotary.org/en/engaging-younger-professionals-toolkit</a>
<b>Updated!</b> <a href="#">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="https://my.rotary.org/en/document/state-membership-presentation">https://my.rotary.org/en/document/state-membership-presentation</a>



RESOURCES			
Name	Description	Audience	Available
<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, alternative membership types start guides, and flexible meeting formats.	Rotary members	N/A
<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	N/A
<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	N/A
<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	N/A
<a href="#">Proposing New Members</a>	Best practices for proposing new members to your club.	Rotary members	N/A
<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="https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs">https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs</a>
<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="https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts">https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts</a>
New Member Welcome Kit	Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, Proud Member window cling.	New members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 426)
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders	<a href="http://www.rotary.org/en/news-features/newsletters">www.rotary.org/en/news-features/newsletters</a>
<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	<a href="https://www.rotary.org/myrotary/en/document/strategic-planning-guide">https://www.rotary.org/myrotary/en/document/strategic-planning-guide</a>





WEBINARS			
Name	Description	Audience	Available
Hot, Warm, and Cold Leads: Engaging Your Prospective Members (Club Level)	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="https://vimeo.com/240685013">https://vimeo.com/240685013</a>
First Impressions Matter webinar: The Membership Experience	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="https://vimeo.com/232717098">https://vimeo.com/232717098</a>
How to Manage Membership Leads for District Leaders	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="https://vimeo.com/214073740">https://vimeo.com/214073740</a>
<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="https://vimeo.com/180066536">https://vimeo.com/180066536</a>
<a href="#">Understanding Young Professionals</a>	Led by Rotary staff and a market research professional, this webinar is intended to help members better understand the perceptions and needs of young professionals. Password: <b>YPC</b>	Rotary members	<a href="https://vimeo.com/89536946">https://vimeo.com/89536946</a>

TRAINING MANUALS			
Name	Description	Audience	Available
<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	N/A
<a href="#">Lead Your Club: Membership Committee</a>	Describes the responsibilities of the chair and committee, and identifies resources that may be helpful relating to increasing the club's membership.	Club leaders	<a href="http://shop.rotary.org/(SKU: 226)">http://shop.rotary.org/(SKU: 226)</a>

If you have any questions about these specific references, please contact your District Membership Chair.

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Small Groups  
A & B



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Small Groups  
E & F



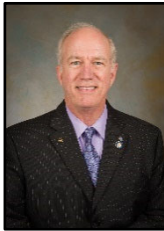
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I & J



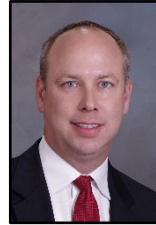
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# Rotary Carolinas' PETS



Arden, Asheville, Asheville Breakfast, Asheville-Biltmore, Asheville-Metro, Asheville-South, Asheville-West, Assistant Governor, Avery County, Black Mountain, Blowing Rock, Boone, Boone Sunrise, Brevard, Bryson City, Burke-Sunrise, Burnsville, Caldwell County, Cashiers Valley, Catawba Valley (Conover), Clay County, Denver/Lake Norman, Discussion Leader, District Governor 2020-2021, District Governor 2021-2022, District Secretary, Franklin, Franklin Daybreak,

Granite Falls, Haywood County (Canton), Hendersonville, Hendersonville-Four Seasons, Hickory, Hickory Sunrise, Highlands, Highlands-Mountaintop, Lake Hickory (Hickory), Lenoir, Lincolnton, Lincolnton-Sunrise, Madison County, Marion, Morganton, Murphy, Newton-Conover, PETS Staff, Pisgah Forest, Sherrills Ford-Terrell, Spruce Pine, Sylva, Tryon, Valdese, Waynesville, Waynesville-Sunrise, Albemarle, Alleghany County, Alleghany County Evening, Ashe County, Ballantyne, Belmont, Boiling Springs Area, Cabarrus County, Charlotte, Charlotte Dilworth South End, Charlotte International, Charlotte North, Charlotte Providence, Charlotte South, Charlotte South Park, Charlotte Top-of-the-Week, Charlotte West, Cherryville, China Grove, Concord, Concord Afton-Sunset, Davidson, Gaston Breakfast, Gastonia, Gastonia East, Gastonia Evening, Greater Statesville, Hamlet, Huntersville Happy Hour, Kannapolis, Kings Mountain, Lake Norman-Huntersville, Marshville, Matthews, Mecklenburg County-South, Monroe, Monroe-Union Breakfast, Mooresville, Mooresville-Lake Norman, Mount Holly, North Mecklenburg County, North Wilkesboro, Rockingham, Rowan County, Salisbury, Shelby, Shelby Breakfast, Southwest Cabarrus, Statesville, Statesville/Fourth Creek, Taylorsville, The Queen City, Top of the Lake-Mooresville, Troutman, Union West (Indian Trail), Wadesboro, Waxhaw-Weddington, West Stanly, Alamance (Burlington), Archdale-Trinity, Asheboro, Burlington, Carthage, Clemmons, Crescent, District Executive Secretary, East Greensboro, Eden, Furnitureland, Gate City, Global Trekkers, Graham, Greensboro, Greensboro Airport, Guilford, High Point, Jamestown, Jonesboro, Kernersville, King, Lexington, Liberty, Madison-Mayodan, Mebane, Midstate, Mocksville, Mount Airy, Pinehurst, Pittsboro, Randolph, Reidsville, Reynolda, Sandhills, Sanford, Siler City, Southern Guilford, Southern Pines, Stoneville, Stratford, Summit, Surry Sunrise, Thomasville, Troy, Western Forsyth, Winston-Salem, Yadkin Valley, Yadkinville, Angier, Apex, Apex Sunrise, Capital City, Cary, Cary Central, Cary MacGregor, Cary-Kildaire, Cary-Page, Central Johnston County, Chapel Hill, Chapel Hill-Carrboro Sunrise, Clayton, Clayton Mid-Day, Cleveland School, Crabtree, Dunn, Dunn-Erwin, Durham, Durham Sunrise, East Chapel Hill, E-Club of D7710, Fuquay-Varina, Fuquay-Varina Downtown, Garner, Garner Mid-Day, Henderson, Hillsborough, Holly Springs, Knightdale, Lillington, Morrisville, North Raleigh, Oxford, Raleigh, Raleigh Midtown, Raleigh/Cary Parkside, Research Triangle Park, Roxboro, South Granville County, Southwest Durham, Wake Forest, Wakefield/Wake Forest, Warrenton, Wendell, West Raleigh, Zebulon, Ahoskie, Ayden, Belhaven-Pantego, Bethel, Columbia, Currituck Wild Goose, District Governor 2019-2020, Edenton, Elizabeth City, Elizabeth City Morning, Elm City, Farmville, First Flight (Kill Devil Hills), Fremont, Goldsboro, Goldsboro-Three Eagles, Greater Wilson, Greenville, Greenville (Morning), Greenville Noon, Havelock-Cherry Point, Hertford, Kitty Hawk, Manteo, Mount Olive, Murfreesboro, Nash-Rocky Mount, New Bern, New Bern-Breakfast, North Banks (Kill Devil Hills), Oriental, Roanoke Rapids, Rocky Mount, Tarboro, Vanceboro, Washington, Washington (Noon), Williamston, Wilson, Windsor, Beaufort-Ole Towne, Bladenboro, Burgaw, Clinton, Clinton-Sampson County, Coastal Pender, District Governor 2022-2023, Duplin, Elizabethtown, Fair Bluff, Fairmont, Fayetteville, Jacksonville, Jacksonville Breakfast, Jacksonville South, Kinston, La Grange, Laurinburg, Leland Area, Liberty Point, Lumberton, Maysville, Morehead City, Morehead City After Hours, Morehead City Navigators, Morehead City-Lookout, Morehead City-Noon, Morehead City-Soundview, New River (Onslow County), Newport, Passport, Pollocksville, Red Springs, Richlands, Shallotte, Sneads Ferry, South Brunswick Islands, Southport, Southport Evening, Surf City, Swansboro, Trenton, Wallace, West Fayetteville, Whiteville, Wilmington, Wilmington Cape Fear, Wilmington Central, Wilmington East, Wilmington South, Wilmington West, Abbeville, Aiken, Aiken Sunrise, Anderson, Batesburg-Leesville, Blacksburg, Chester, Clemson, Clemson-Calhoun, Clinton, Clover, District Administrator, District Trainer, Easley, E-Club of the Carolinas, Emerald City, Fort Mill, Fountain Inn, Gaffney, Golden Strip Sunrise, Greater Anderson, Greenville, Greenville Breakfast, Greenville City Center, Greenwood, Guest of District Governor, Indian Land, Indian Land Lunch, Inman, Lake Wylie, Lancaster, Lancaster Breakfast, Laurens, Mauldin, Newberry, North Augusta, North Spartanburg, Pickens, Pleasantburg, Reedy River Greenville, Rock Hill, Seneca, Seneca Golden Corner, Simpsonville, Spartan West, Spartanburg, The Foothills, Travelers Rest, Twin City Batesburg-Leesville, Union, Walhalla, Westminster, Winnsboro, York, Manning [SC], Rumford - River Valley [ME], Exhibitor, Guest Speaker, RI Director, RI Past Director, RI Past Vice President, RI Staff - Club & District Support, RI Staff - Membership Officer, RI Staff - Rotary Foundation, RI Staff - Service & Engagement, Rotary Coordinator, Rotary Foundation Alumni, Rotary Public Image Coordinator, Rotary Regional Foundation Coordinator, Rotary Regional Membership Coordinator, Sergeant-At-Arms, Vendors