President Elect Seminar
February 25, 2023

CREATE HOPE
in the WORLD

Rotary
District 7750

District Governor 2023-24
Renée Stubbs

Welcome

Welcome to District 7750 President-Elect Training Seminar.
Through the presentations today, we hope to

inform,
inspire,
and empower.

Rotary club presidents to lead successful and engaging Rotary Clubs for the year ahead.

As RIPE Gordon says, "*I want Rotary to become known as an organization that takes care of its members as well as the communities we serve. When you engage members and deliver value, your club will be stronger, more attractive, and more fun. I'm excited for our year as Rotary leaders. Together, I know we will* Create Hope in the World."

Use this opportunity to get to know your fellow Rotarians and your Assistant Governor.
We encourage you to introduce yourself and share your experiences on how your club engages members, plans projects, and manages change. You can learn much from each other!
Please ask questions of our presenters; they have so much to share that we cannot fit into this one day. You will learn even more at Carolinas' PETS in March.

This workbook provides resources for you when you return to begin meetings with your board of directors and committee chairs. Many things have changed about how we do Rotary. Leading change is not an easy task sometimes. Please do not hesitate to ask our district leaders and committee chairs for ideas and assistance.

We wish you success during the exciting year ahead.

Yours in Rotary Fellowship and Service,

Renée Stubbs

District Governor 2023-24
Rotary District 7750

Agenda Pre-PETS
February 25, 2023

8:30 Registration/Networking
9:00 Welcome and Introductions
9:15 Teambuilding: Expectations of a Club President
9:40 Resources to Support the Club President
- Your own Club Leadership Line
- Your own Club committee chairs
- Assistant Governor
- District Committee Chairs
- District Administrator
- Online Resources
- District Governor

10:10 Break
10:20 Purpose of the Club Plan
10:30 Membership Matters - Creating an Engaging Club
- Work on the Club Plan Membership Section

11:10 Our Foundation - Doing Good in the World and Our Communities
- Work on Club Plan Foundation Section
- Grant application and expectations

11:50 Q & A
12:00 Lunch
12:30 Environmental grant ideas
1:00 Public Image and Public Relations
1:30 Break
1:40 Your club plan/Planning your year as Club President
1:50 Work on club plans
2:10 Enthusiastic Club Leadership
2:25 Time Management
2:35 What to expect at PETS
2:45 Closing remarks
3:00 Adjourn

Contents

Rotary Vision, Object of Rotary, Areas of Focus, Avenues of Service	5
Rotary Code of Conduct	6
Rotary Club Constitution link	6
Club President Impact Worksheet	7
Creating a Welcoming Club Culture	8
How much does it cost to be a Rotarian?	8
Membership Action Plan online MAP tool	10
Flexible Membership Options	11
Rotary Club Models	13
Sample Club Membership Application document	15
Sharing Rotary with others	18
Membership Section of the Rotary Club Constitution	19
The Rotary Foundation	20
District 7750 Grant Procedures	25
Environmental Projects	33
The Rotary Brand	35
Public Image and Public Relations	38
Online Resources	42

Appendix	
Club Plan Guide	handout
Tax Information for Rotary Clubs	43
Rotary Liability Insurance	43
Rotary's Approach to Change	44
Diversity, Equity, and Inclusion Code of Conduct	45
Adult Harassment Issues	46
Online Resources help pages	48

Rotary District 7750 | CREATE HOPE in the WORLD

OUR VISION

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

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:

The development of acquaintance as an opportunity for service.

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.

The application of the ideal of service in each Rotarian's personal, business, and community life.

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

The Avenues of Service

Club Service
Vocational Service
Community Service
International Service
New Generations Service

Of the Things We Think, say, and Do:
Is it the TRUTH?
Is it FAIR to all concerned?
Will it build GOODWILL and BETTER FRIENDSHIPS?
Will it be BENEFICIAL to all concerned?

rcs

AREAS OF FOCUS

PEACEBUILDING AND CONFLICT PREVENTION

MATERNAL AND CHILD HEALTH

DISEASE PREVENTION AND TREATMENT

WATER, SANITATION, AND HYGIENE

BASIC EDUCATION AND LITERACY

ENVIRONMENT

Rotary

ROTARIAN CODE OF CONDUCT

As a Rotarian, I will:

- Act with integrity and high ethical standards in my personal and professional life.
- Deal fairly with others and treat them and their occupations with respect.
- Use my professional skills through Rotary to mentor young people, help those. with special needs, and improve people's quality of life in my community and in the world
- Avoid behavior that reflects adversely on Rotary or other Rotarians.
- Help maintain a harassment-free environment in Rotary meetings, events, and activities; report any suspected harassment; and help ensure non-retaliation to those individuals that report harassment.

Rotary International Club Constitution
Rotary International Club Bylaws

Downloadable at:
https://my.rotary.org/en/learning-reference/about-rotary/governance-documents

Membership is Our Priority
and
It's not just about the numbers but the **Impact**

The Big Question

As Club President, what IMPACT will you have on your Rotary Club?

Something to talk with your club about

Meeting Time:
Meeting Location:

It cost _____ per year to be a member of the Rotary Club Of _____
This much per month _____

The Value Proposition for joining the Rotary Club of _____ is…

Is your Rotary Club exclusive or inclusive? How do the answers to the above items effect who can become a Rotarian in your community?

CREATING A WELCOMING CULTURE

Think about your club.
If you were a prospective member today, which club in your area would you most want to join? Remember all clubs have a different culture. Some clubs may have a heavy service aspect while other more for fellowship.

Use the chart below to identify what qualities of that club would make you interested in it.
Club in my district that I would join if I were a prospective member:

Aspects of the club culture	How does the club achieve this?
Club environment: *How does this club make people feel included? How does the club make people feel comfortable being themselves?*	
Accessibility: *How easy is it for people with disabilities to participate in club meetings and activities?*	
Fellowship: *What makes this club fun? How do members show that they care about each other?*	
Service: *How is this club making a difference?*	
Image: *How is this club perceived in its community? Operations: How often does the club meet? Are its meetings organized and its expectations clear? How strict or flexible is the experience?*	

How Much Does It Cost to be a Rotarian?

<u>Really not that much!</u>

International Dues are $92.49 per year 2023-24
District 7750 Dues are a total of $50.00 per year 2023-24
Total: $142.49 per year
That's $11.88 per month.

Are your club dues and assessments causing potential members to politely decline membership in Rotary?

Have you considered other membership options, such as Service Only Option, Family Option, Associate Option. Remember these are not membership types. They are membership options, and the member is quantified as an Active member only if they are paying international and district dues.

Membership
Butch Hughes
District 7750 Membership Chair
iPDG Carol Burdette Innovative Clubs Chair

Dear club president and membership chair:

Around the world, incoming club presidents are gathering to learn, to connect with one another, and to plan for their year ahead. It's an exciting time as we all think about what we want to achieve in the coming Rotary year and how we can do it. I want to ask you to remember an important insight as you plan and prepare. Recent Rotary research confirms what we already knew but haven't always articulated; members' overall satisfaction is most closely related to their club experience.

It's simple really; what a member experiences in their club matters, and you play a vitally important role in that. As a club leader, you have the unique opportunity to make sure that members feel welcomed and included, have opportunities for personal growth and leadership development, can make meaningful connections, and are contributing to service in significant ways.

I want Rotary to become known as an organization that takes care of its members as well as the communities we serve. When you engage members and deliver value, your club will be stronger, more attractive, and more fun. I'm excited for our year as Rotary leaders. Together, I know we will *Create Hope in the World*.

Best regards,
R. Gordon R. McInally
President, Rotary International 2023-24

Membership Action Plan
Online Tools for Membership

Please Share with your Club Membership Chair

At its core, a Rotary club is a membership organization, and it takes **members** to deliver community service – locally, regionally and globally.
Consistent growth ensures a vibrant, impactful organization that can make a difference, both locally and globally for decades to come.

Using the MAP tool ,once you've set a membership goal, the Progress Dashboard provides you a monthly updated snapshot of your pace of attracting new members, compared to the pace needed to meet your membership growth goals, plus replace those likely to leave over the year.

Start by setting a membership goal for your club, using the Membership Goal link on the left. Considering your club's recent membership history, what's a reasonable growth goal? Something in the range of 5%-10% is reachable for most clubs -- Just enter that growth rate in the goal setting worksheet. Alternatively, you can enter a numerical membership goal and the growth percentage will be calculated for you.

Once you've set a membership goal, the Progress Dashboard provides you a monthly updated snapshot of your pace of attracting new members, compared to the pace needed to meet your membership growth goals, plus replace those likely to leave over the year.

If the MAP Icon does not appear on your DACdb Dashboard.

- Open DACdb
- Click on the **My Club tab** at the top of the webpage.
- Click on the **little gear icon** in the top right corner of the page.
- From the new window, look at the blue rectangles and find **MAP.**
- **Drag** the blue Map rectangle to the row of yellow rectangles.
- **Click Set my Configuration** in the bottom right of the window.

Another Useful membership tool is Club Statistics

In DACdb
My Club Tab
Click on the **Club Statistics Icon**
Membership Demographic information

Flexible Active Membership Options

https://my.rotary.org/en/club-flexibility-faq

Many of the traditional rules and requirements that Rotary clubs have had historically, such as weekly meetings, attendance requirements, morning or lunch meetings, traditional classifications, and high costs, have limited who is able or willing to join. When we join together different perspectives and backgrounds, professions and areas of expertise, talents and resources, we can see challenges in new ways and identify creative solutions.

Any Rotary club wishing to try a new approach can do so by amending its bylaws as permitted by the Standard Rotary Club Constitution. But clubs can also continue to follow their current requirements for meetings, attendance, structure, and categories of membership. Have a conversation with your club members to determine whether flexible options can help to address your club's membership needs.

In what ways are clubs changing their meeting format?

Clubs are demonstrating innovation and flexibility by replacing the traditional speaker and meal meeting format with a variety of new formats. Some clubs are rotating where they meet by holding gatherings in a member's home, a local restaurant, or other "offsite" locations such as a local business. Some clubs are meeting virtually or allowing some of their members to call into the in-person meeting. Many clubs are using meetings to plan and conduct their service projects and fundraisers, and having social events to get to know other members better. Consider surveying your members to see what new formats they would be interested in.

What are the advantages of changing the meeting format?

Changing the meeting format not only gives members a variety of club experiences, but also keeps them engaged and active in the club. It can also be more appealing to guests to have hands-on, fun, productive meetings that connect with Rotary's values and mission. This form of flexibility also makes it easier for some members to attend meetings virtually when they would not have been able to attend in person. We recommend asking current and prospective members what they hope for in a club meeting experience.

How frequently should clubs meet?

Clubs should offer opportunities to meet twice per month at minimum. Those meetings could be traditional meetings, social outings, service projects, etc. Clubs that wish to meet more often can do so.

Are clubs allowed to remove attendance requirements?

Yes. Clubs are encouraged to relax attendance expectations or not have them at all. Our research shows that rigid rules and policies are a barrier to attracting new members and engaging current ones. Further, it excludes younger professionals who have developing careers and young families. Attending meetings is an opportunity, not an obligation.

Does our club secretary still need to send monthly attendance reports to the district governor?

Rotary International does not collect attendance reports, which were originally thought of as a way to gauge how engaged members are and how healthy the club is. Some districts continue to follow this method. However, we can measure club health in other ways – for example, by how many members are involved in a project, club leadership role, or by how many beneficiaries have benefitted from your club's service. Ask your district governor what is preferred, and whether a report is needed or whether the information can be captured and shared using Rotary Club Central.

What membership options exist?

There can be as many types of membership as are created by clubs. Some popular examples are corporate, family, or younger professional membership. However, a club is free to design different membership types that attract diverse members, as long as it's documented how they differ from traditional membership in their club bylaws. The Rotary International database does not track membership types – only whether a member is active or honorary.

How do younger professional memberships work?

Some clubs have designed a membership type for younger professionals with a more affordable dues structure, and more flexible expectations for participating. Clubs that create this type of membership recognize that younger members can play an integral role in the future of their club, but may not have the financial resources or available time to attend weekly meetings at this point in their careers.

How do family memberships work?

Family membership – also called spouse or partner memberships – are similar to corporate membership, in that there is often a primary member and one or more alternate members. Often times, the alternate members are young adult children of the primary member or a partner or spouse. Clubs that offer this type of membership typically offer a reduced rate for the alternate member(s) as an incentive to join. The alternate members can attend in the primary member's place or come along with their family member Rotarian. Alternate members may be active, RI-dues paying members or not, depending on how the club chooses to structure this membership type.

How do corporate memberships work?

Your club is free to offer alternative membership types of any kind, as long as new members are counted as individuals — corporate members in this case — rather than the corporations that sponsor their membership. If the members pay RI dues, they will be included in your club's official membership count and receive all the benefits that other active, dues-paying members enjoy.
Your club can have different policies for these members' other financial obligations (club and district dues, meal costs, etc.), attendance requirements, or service expectations, as long as these policies are reflected in the club bylaws. Learn more in our Guide to Corporate Membership. *(Please go to the website and download the documents. Good information, Application and more)*

Rotary Club Models

Does the time your Rotary club meets or the number of times per month your club meets cause a potential member to not join your club?

Rotary Club Models

https://my.rotary.org/en/club-flexibility-faq

What Rotary club models are there?

Club models simply refers to the way a club chooses to operate. The beauty of flexibility is that each club is free to define its own internal way of life within the framework set by the constitutional documents. Some trends that have emerged are included in this document.

Please see the document on the Rotary Website for details
Club models to consider:
Service Only Club
Focus Group Club, such a Literacy, Environment, Young Professionals, and more

How does a satellite club work?

Satellite clubs are branch clubs of a sponsor club. The satellite club members are Rotarians and considered members of the sponsor club. Only eight members and the support of a sponsor club are needed to start a satellite club. They often offer a different club environment or meeting time and location from their sponsor club. Like a Rotary club, satellite clubs hold regular meetings, have bylaws and a board, and get involved in community service projects. The sponsor club provides advice and support. In some cases, satellite clubs may grow and apply to become a separate Rotary club. Satellite club members are Rotarians. Officially, they are members of the sponsor club. For more information, see the Guide to Satellite Clubs and the Satellite Club Frequently Asked Questions.

How could my club benefit from creating a satellite club?

Starting a satellite club offers the additional benefits of expanding project possibilities, visibility, and the impact of Rotary in your community. Satellite clubs can also attract members who want a different or more affordable club experience or bring Rotary to communities that might not be able to support a standalone club and serve as transitional Rotary clubs.

SAMPLE of a Club's Membership Option

SHARED MEMBER PROGRAM (This could be renamed as Associate, Family, Service only etc.)
Feedback from numerous Rotary surveys and focus groups has repeatedly shown that prospective members and current younger Rotarians require flexibility in their Rotary club membership.
In 2016 the Rotary Council of Legislation included in the suggested club constitution and bylaws that clubs consider more options for membership types.
The Shared Membership Program will allow a business, school system, or family in the club's area to become a member of the Rotary Club of Newberry through an established membership approval process, and to appoint up to 2 designees as the individuals attending club meetings, serving on projects, voting on club matters, and serving as club officers and on club committees, and so on.

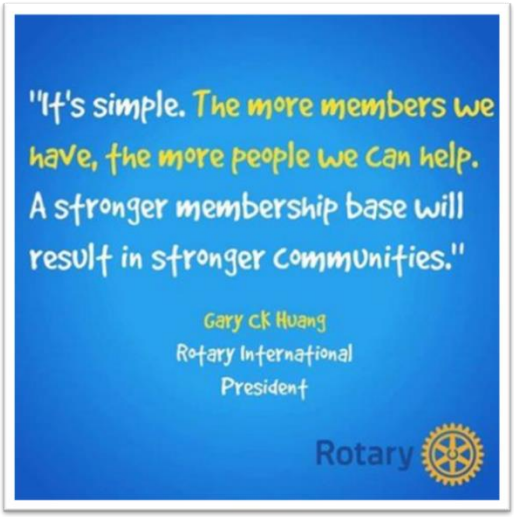
PREMISE
A shared membership category will increase the club's ability to attract and retain a qualified and diverse professional base within the community.

DEMONSTRATED RESULTS AND MEASURES from other Rotary Clubs

Increase
- Club membership recruitment and retention
- Support to The Rotary Foundation (program participation and fundraising)
- Successful service projects (community and international)

Improvement
- Leadership and engagement opportunities for members
- Participation in club activities
- Gender balance in the clubs' membership
- Overall diversity within the club's membership

Decrease
The average age of club membership



Rotary District 7750 | CREATE HOPE in the WORLD

Rotary

Rotary Club of _____

Shared Membership Application

We (I) apply for (*Family or Associate or Cooperate or Service only, or shared, or etc.)* membership in the Rotary Club of _____ and authorize our consideration by the Board of Directors. If approved, we authorize publication of our organization's name and representing officers and classification in the _____ Rotary club's newsletter for consideration by the club membership. We agree to abide by the requirements of membership and to pay the initiation fee and annual dues promptly.

If Applicable.
Company or Firm Name: _____
Business Address: _____
City/State/Zip: _____ Website Address: _____

Primary Member

Name: _____ Title: _____
Business Phone: _____ E-mail: _____
Home Address:_____
Home City/State/Zip:_____ Home/mobile Phone: _____
Birth date including year:_____

Additional Shared Membership

Name: _____ Title: _____
Business Phone: _____ E-mail: _____
Home Address:_____
Home City/State/Zip:_____ Home/mobile Phone: _____
Birth date including year:_____

Additional Shared Membership

Name: _____ Title: _____
Business Phone: _____ E-mail: _____
Home Address:_____
Home City/State/Zip:_____ Home/mobile Phone: _____
Birth date including year:_____

Signature of Primary Member: _____ _____ Date: _____

Rotary District 7750 | CREATE HOPE in the WORLD

Rotary

Rotary Club of _____ Shared Membership Guidelines

The Shared Membership Program will allow a business, school system, or family in the club's area to become a member of the Rotary Club of Newberry through an established membership approval process, and to appoint up to 2 designees as the individuals attending club meetings, serving on projects, voting on club matters, and serving as club officers and on club committees, and so on.

1. Approval. Members joining through a shared membership may become members of the Rotary Club of _____ through the same approval process established by the club in the club bylaws. Article eleven.

2. **Inductions.** All persons joining through a shared membership are formally inducted into the club as established by the club.

3. **Attendance.** All members joining through a shared membership are encouraged to be as active and engaged as possible. Participation in club projects is expected.

4. **RI registration.** Each member will be listed as an **official active member** of the Rotary Club and Rotary International.

5. **Badges.** Badge references will be the same as an individual member.

6. **Votes and quorum.** For the purpose of general meetings and club matters, shared membership members voting will be the same as an individual member. As official members of the Rotary Club of Newberry members would apply toward RI election voting.

7. **Holding office.** Each member as an individual, can hold any office in the Rotary Club of _____ to which a member is elected in the normal way.

8. **Financial obligations.** The financial obligations of a shared membership may be as follows:
(a) Initiation fee. Each member will pay the initial fee.
(b) RI dues: Payable for each member as stipulated in RI Bylaws 17.030. Each member
(c) Annual club dues: An amount determined by the club. Each member.
(d) Meal/beverage costs: The primary member will be charged for meals. In the case that others named in the shared membership attend the club meeting they will be charged per meal. If the primary member does not attend, one of the other designated member(s) may attend and not be charged for a meal.
(e) Optional contribution to The Rotary Foundation.
(f) Tickets for the annual Community Prayer Breakfast.

(Make changes as needed)

- Each individual will have a $35 one-time initial fee if he/she has never been a Rotary member in any club.
- Each membership (regardless of the number of individual members) will have a $45 annual assessment to support two of our club service projects.
- 1 member is $100 a quarter ($400 annually)
- 2 members is $150 a quarter ($600 annually) Plus extra meal if both attend
- 3 members is $200 a quarter ($800 annually) Plus extra meals if more than one attends

9. **Bulletin and communication.** Each member will receive the club's bi-weekly bulletin/newsletter and regular club communications.

10. **Receipt of *Rotary*.** The Rotary magazine will be sent to each member at the prevailing cost.

11. **Liability coverage.** All members will be included under the respective club liability insurance while participating in any approved club activities or projects.

12. **Participation in youth activities.** All members are expected to abide by all restrictions, policies, and procedures with respect to club activities involving youth.

13. **Termination.** The process for terminating the membership will be the same as an individual member as stated in the club bylaws article twelve.

14. **Primary Member Termination.** In the event the Primary Member is terminated, one of the shared members may assume the financial responsibilities of the Primary Member or another Primary Member may apply for membership in the Primary role within 90 days. Or the shared members may each assume regular individual membership. If the shared members do not wish to participate financially as an individual member or Primary member then they will be terminated.

Rotary District 7750 | CREATE HOPE in the WORLD

HOW TO SHARE ROTARY WITH OTHERS

RECOGNIZE THE OPPORTUNITY
DON'T BE SHY AND LOOK FOR SIGNALS THAT SOMEONE IS SERVICE ORIENTED.

AVOID THE JARGON
KEEP IT SIMPLE. FOCUS ON THE WHY WE DO INSTEAD OF ROTARY'S STRUCTURE OR LINGO.

FIND THE "PASSION" CONNECTION
LISTEN AND IDENTIFY WHAT PASSIONS YOU SHARE. HOW DOES THAT CONNECT TO ROTARY?

KEEP IT REAL & LOCAL
ANSWER QUESTIONS WITH YOUR PERSONAL EXPERIENCES & LOCAL PROJECTS. TALK ABOUT FRIENDSHIPS, NETWORKING, AND ROTARY'S VISION.

SHARE YOUR STORY
SHARE YOUR LOVE FOR ROTARY AND WHY YOU ARE HOOKED ON SERVICE.

FOLLOW UP
YOU CAN'T SHARE EVERYTHING IN ONE SITTING. IF YOU FEEL THERE WAS INTEREST, DON'T FORGET TO FOLLOW UP.

Rotary PEOPLE OF ACTION

Discover Rotary

SERVE TO CHANGE LIVES

Sept. 2, 5:15pm

Half Full on Main St. on the parking lot side

Join us for a Discover Rotary event to learn about how Rotary serves our community and the world. Information on how you can become a valuable member of our organization will be provided. Also plan to stay for a social time to meet some of our members.

CONTACT: Renee Stubbs, newberryrotaryclub@gmail.com
Membership Chair

JOIN LEADERS
EXCHANGE IDEAS
TAKE ACTION
IN YOUR COMMUNITY

Rotary Club of Newberry | Service Above Self

WE'RE LOOKING FOR...

Community Minded People
Passionate & Fun People
Practical & Resourceful People
Helpful People

If you're one of these people, then get in contact to see how you can change the world starting in your very own community!

Membership section of The Rotary Club Constitution

Complete Rotary Club Constitution can be downloaded from the District 7750 website or the Rotary International Website
www.rotary7750.org under Club Leadership Library-Club President
www.rotary.org

Note: Form the Rotary International Bylaws: 2.030. The Standard Rotary Club Constitution. All clubs shall adopt the standard club constitution, including any future amendments to it.

Article 8 Membership
Section 1 — General Qualifications.
This club shall be composed of adult persons who demonstrate good character, integrity, and leadership; possess good reputation within their business, profession, and/or community; and are willing to serve in their community and/or around the world.

Section 2 — Types.
This club shall have two types of membership, active and honorary. Clubs may create other types in accordance with section 7 of this article. These members are reported to RI as either active or honorary.

Section 3 — Active Members.
A person who possesses the qualifications in article 4, section 2(a) of the RI constitution may be elected as an active club member.

Section 4 — Satellite Club Members.
Members of a satellite club of this club shall also be members of a club until the satellite club is admitted to RI membership as a Rotary club.

Section 5 — Prohibited Dual Memberships.
No member shall simultaneously (a) belong to this and another club other than a satellite of a club, or (b) be an honorary member in this club.

Section 6 — Honorary Membership.
This club may elect honorary members for terms set by the board, who shall: (a) be exempt from paying dues; (b) not vote; (c) not hold any club office; (d) not hold classifications; and (e) be entitled to attend all meetings and enjoy all other privileges in the club, but have no rights or privileges in any other club, except to visit without being a Rotarian's guest.

Section 7 – Exceptions.
The bylaws may include provisions that are not in accordance with article 8, sections 2 and 4 - 6.

Article 9 Club Membership Composition Section 1 — General Provisions.
Each member shall be classified in accordance with the member's business, profession, occupation, or community service. The classification shall describe the principal and recognized activity of the member's firm, company, or institution, the member's principal and recognized business or professional activity, or the nature of the member's community service activity. The board may adjust a member's classification if the member changes positions, professions, or occupations. Section 2 —Diverse Club Membership. This club's membership should represent a cross section of the businesses, professions, occupations, and civic organizations in its community, including age, gender, and ethnic diversity.

Beth Padgett
District Rotary Foundation Chair (DRFC)

The Club President's Role in Supporting The Rotary Foundation

1. Enthusiastically support The Rotary Foundation.
2. Lead by example with your giving.
3. Be able to discuss why Rotarians should give to The Rotary Foundation.
4. Discuss the Foundation when you speak to clubs.
5. Make sure your club knows key Foundation dates.
6. Help encourage attendance at the annual Foundation celebration.
7. Make sure club stays on track with their District Grants.

* Make sure club enters their Foundation Goal in Rotary Central

Personal Knowledge of The Rotary Foundation

8. Know the basics about the various Rotary Foundation funds.
9. Know the individual and club Foundation awards.
10. Know how District Grants are funded.
11. Know why Annual Fund – SHARE is so important.

Using Key Reports and Setting Club Goals

12. Know how to find and read the key Foundation reports.
13. Discuss Foundation goals with your board and club early in the new club year.
15. Use CFA and CRS to help club stay on track.
16. Encourage club to be 100% EREY AND 100% Sustaining Members.

Helping Club Have a Successful Rotary Foundation Year

17. Encourage club to turn in their Foundation donations at least quarterly.
18. Ensure club turns in all Foundation donations by mid-June.

19.. Talk to the DRFC if you hear or see a possible Paul Harris Society member, Major Donor of Bequest Society member.

20. Contact the DRFC for any reason big or small!

The Rotary Foundation

Planning for the 2023-2024 Rotary Year

Rotary District 7750 has a culture of giving to The Rotary Foundation. Why do we give to The Rotary Foundation? Rotary's motto is "Service Above Self" and The Rotary Foundation's motto is "Doing Good in the World". By giving to The Rotary Foundation, we can fulfill both ideals. The Rotary Foundation allows us to pool our resources of time, money, and/or talents with the opportunity of "Doing Good in the World".
Planning for the 2023-2024 Rotary Year starts **now** for The Rotary Foundation. What can you do now to make sure your year is successful?

1. **Goal Setting** – Determining club's giving based on past contributions and anticipating new contributions.

    a. **Major Gifts** – Contributions of $10,000 or more to AF-SHARE or Polio
        i. If you have club members that make Major Gifts, you will want to thank them for their contribution. Many of them will continue giving at an increased level because of their commitment to The Rotary Foundation.

    b. **Paul Harris Society Member** – $1,000 contribution on annual basis. Can combine AF-SHARE, Polio, and/or qualified Grant.
        i. Find out how many PHS members are in your club.
        ii. Consider becoming a PHS member during your year.
        iii. Easiest way is to sign up for Rotary Direct at $85 per month to AF- SHARE. Also, I like to recommend contributing $15 per month to Polio.

    c. **Sustaining Members** - $100 per Rotary year to AF-SHARE.
        i. Find out how many members are Sustaining Members.
        ii. Consider contributing $100 in July or **sign up for Rotary Direct.**
        iii. Encourage members to make quarterly or annual contributions through dues invoicing.
        iv. Encourage members sign up for Rotary Direct at $10 per month, $25 per quarterly, or $100 annually in a specific month to AF-SHARE.

    d. **100% Paul Harris Fellow Club** – Are you a 100% PHF club
        i. If yes, then you will always be a 100% PHF club. Your club may make as a goal to keep your club at 100% PHFs by getting newer members to become PHF in their first year or two as club members.
        ii. If no, determine what it will take to become a 100% PHF club and put a plan together. If you need help, ask the District Rotary Foundation Chair.

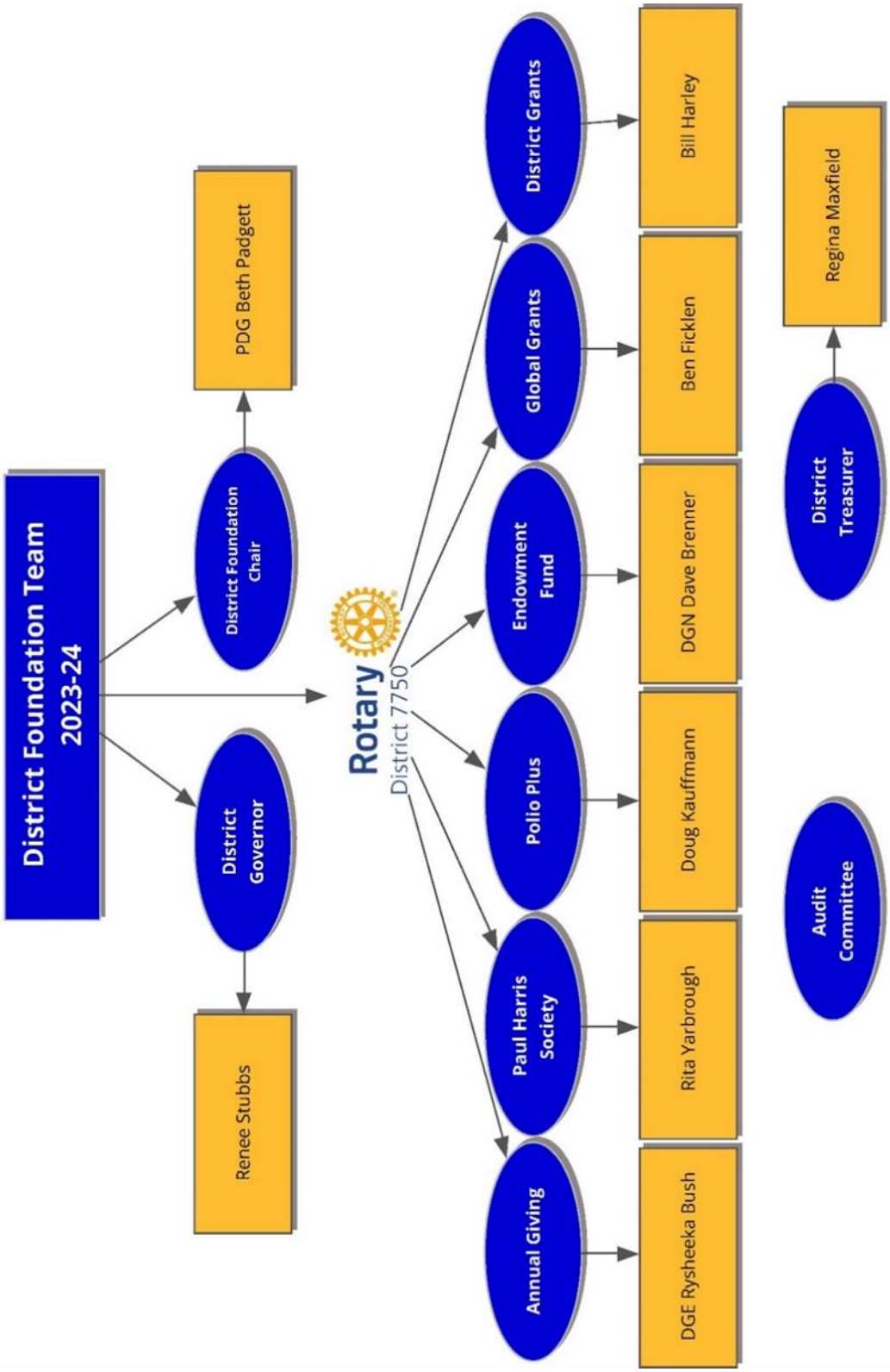
    e. **Benefactors** – Leaving $1,000 in your will, beneficiary of Life Insurance or Retirement account, or other method.
        i. Look at the number of current Benefactors.
        ii. Try to increase number by at least 3 members.
        iii. If you are not a Benefactor, consider signing up
        iv. Ask members to sign up before the District Governor's visit and present to DG.

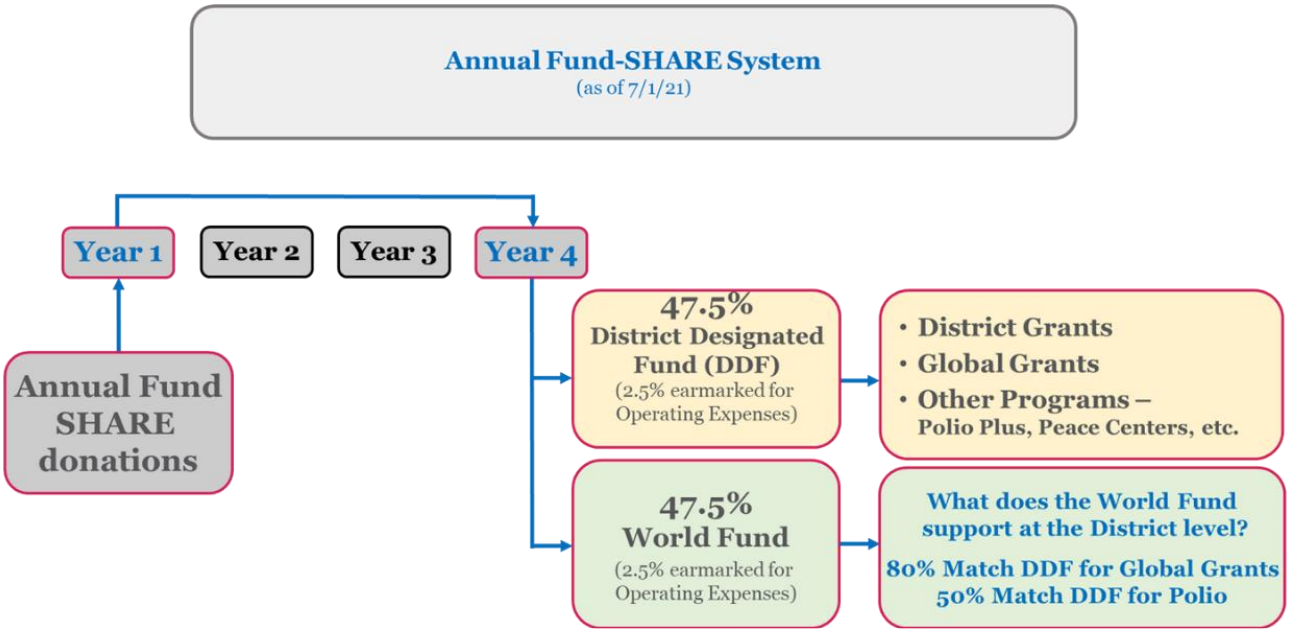
f. **Bequest Society** – Leaving $10,000 or more in your will, beneficiary of Life Insurance or Retirement account, or other method.
   i. Look at the number of current Bequest Society members.
   ii. Try to increase number by at least 1 member.
   iii. If you are not a Bequest Society member, consider becoming one.
   iv. If you have a member interested in the Bequest Society, please let the District Rotary Foundation Chair (DRFC) know and please give the member contact information for the DRFC.

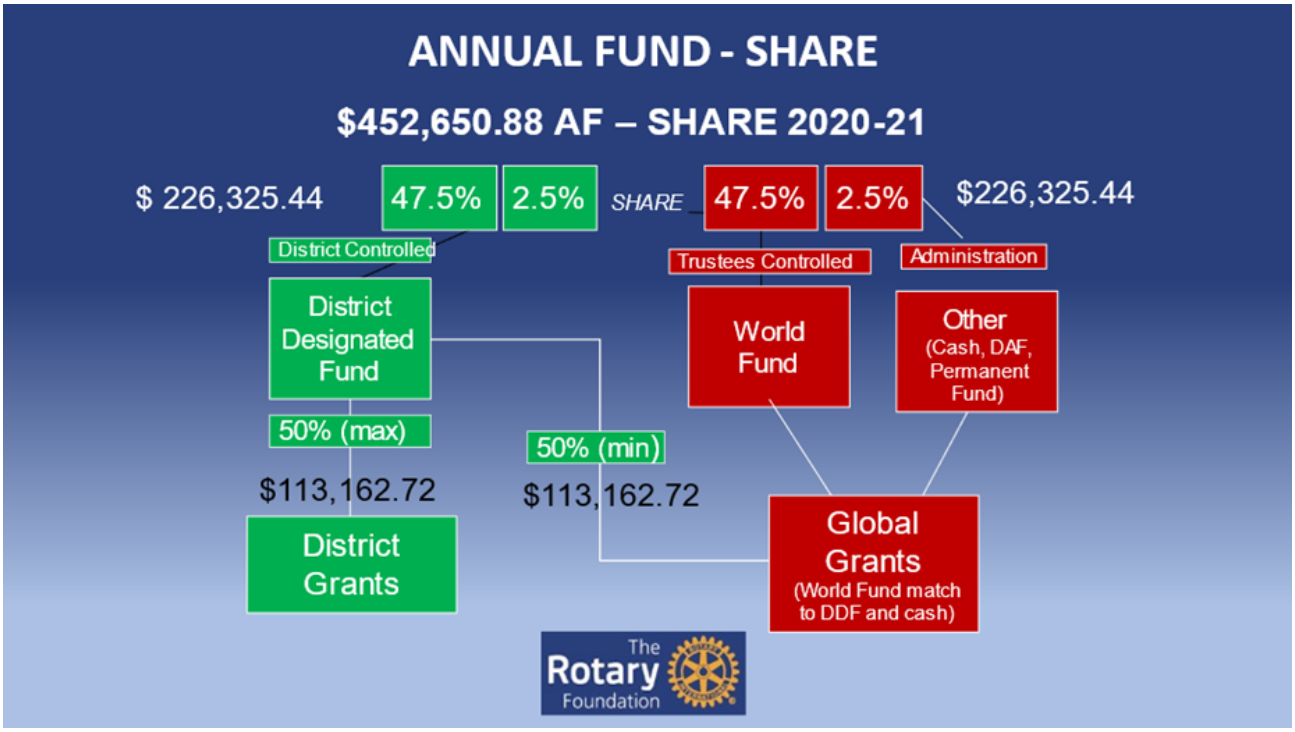
2. **District Grant** – Doing Good in our Communities. The favorite part of The Rotary Foundation is being able to do a District Grant and Global Grants every year. Seeing all the great projects that are done throughout District 7750 is truly a blessing.
   a. Attend District Grant training. A club representative must attend to receive a District Grant
   b. Reports for 2022-2023 due March 31, 2023
   c. Applications for **2023-2024 due April 30, 2023**
   d. Determine with your Board what project(s) you want to do.
   e. Look at the Eligibility Report to determine Maximum Grant Eligibility.
   f. Look at last year's grant and determine if you want to reapply for the same thing.
   g. Keep in mind the needs in your community and the goals of your Rotary Club.
   h. Popular ideas are Weekend Backpacks, School Supplies, Happy Feet, etc.
   i. Find something needed in your community with a hands-on opportunity.
   j. Make sure club members agree to the project.
   k. Be sure to Brand the project in some way.
   l. Application Form is on www.Rotary7750 website – e-file form.

3. **Global Grants** – Doing Good in the World
   a. Haiti – Goat Project – Part III
   b. Honduras – Water Projects – Copan and Santa Rosa
   c. Guatemala – Five Mayan Villages, Maternal & Child Health Malnutrition
   d. Ethiopia – Water and Sanitation for 14 Schools

Have fun with The Rotary Foundation and get everyone in your club and community involved in your projects. Remember that through The Rotary Foundation we are "Doing Good in the World". As we head into a new Rotary year, please remember the 2023-24 Rotary theme, "Create Hope in the World."


District Foundation Team 2023-24
District Governor
Renee Stubbs
District Foundation Chair
PDG Beth Padgett
Rotary District 7750
Annual Giving
DGE Rysheeka Bush
Paul Harris Society
Rita Yarbrough
Polio Plus
Doug Kauffmann
Endowment Fund
DGN Dave Brenner
Global Grants
Ben Ficklen
District Grants
Bill Harley
Audit Committee
District Treasurer
Regina Maxfield


Annual Fund-SHARE System
(as of 7/1/21)
Year 1
Year 2
Year 3
Year 4
Annual Fund SHARE donations
47.5% District Designated Fund (DDF)
(2.5% earmarked for Operating Expenses)
• District Grants
• Global Grants
• Other Programs – Polio Plus, Peace Centers, etc.
47.5% World Fund
(2.5% earmarked for Operating Expenses)
What does the World Fund support at the District level?
80% Match DDF for Global Grants
50% Match DDF for Polio


ANNUAL FUND - SHARE
$452,650.88 AF – SHARE 2020-21
$ 226,325.44
47.5%
2.5%
SHARE
47.5%
2.5%
$226,325.44
District Controlled
Trustees Controlled
Administration
District Designated Fund
World Fund
Other (Cash, DAF, Permanent Fund)
50% (max)
50% (min)
$113,162.72
$113,162.72
District Grants
Global Grants (World Fund match to DDF and cash)
The Rotary Foundation

2023-24 District Grant Application Procedures
Rotary District 7750

Rotary Clubs will be provided with the amount of funding allocated for District Grants in November 2022. The deadline for submission of District Grant applications from clubs is **April 30, 2023.**

The amount of funding available per club typically ranges from $1,000 to $5,000. The applicant club must provide a dollar-for-dollar match for whatever total grant amount is applied for.

The amount of District Grant funding that can be applied for is determined by a Rotary Club's total contributions to the Annual Fund of The Rotary Foundation in 2021-22. The following table describes the maximum grant amounts at the different total contribution levels:

Rotary Clubs contributing less than $50 per capita in 2021-22	Ineligible
Rotary Clubs contributing $50-$100 per capita in 2021-22	Up to $1,000
Rotary Clubs contributing $100 to $175 per capita in 2021-22	Up to $2,500
Rotary Clubs contributing over $175 per capita in 2021-22	Up to $5,000
5th Club in combined per capita and total giving	Up to $6,000
4th Club in combined per capita and total giving	Up to $7,000
3rd Club in combined per capita and total giving	Up to $8,000
2nd Club in combined per capita and total giving	Up to $9,000
1st Club in combined per capita and total giving	Up to $10,000

In addition to the contribution eligibility expectations, a representative from your Rotary Club must attend the Foundation and Grant Training Seminar in November, TBA

The attached table provides specific maximum District Grant levels for each of the Rotary Clubs in District 7750.

Rotary District 7750 | CREATE HOPE in the WORLD

District Grant Eligibility 2023-2024

Club	Members 7/1/21	AF SHARE	AF SHARE Per Capita	Max. Grant Eligibility
Abbeville	45	$2,680	$59.56	$1,000
Aiken	170	$21,023	$123.66	$2,500
Aiken Sunrise	33	$8,186	$248.06	$5,000
Anderson	79	$16,000	$202.53	$5,000
Batesburg-Leesville	25	$3,900	$156.00	$2,500
Blacksburg	16	$1,375	$85.94	$1,000
Carolina Foothills	18	$2,525	$140.28	$2,500
Chester	47	$3,340	$71.06	$1,000
Clemson	93	$9,933	$106.80	$2,500
Clemson Sunrise	37	$12,445	$336.34	$5,000
Clinton	38	$4,750	$125.00	$2,500
Clover	23	$2,580	$112.17	$2,500
Easley	60	$24,378	$406.30	$7,000
E-Club of The Carolinas	29	$14,215	$490.16	$5,000
Emerald City (Greenwood)	69	$32,476	$470.67	$10,000
Fort Mill	76	$31,538	$414.97	$9,000
Fountain Inn	38	$3,210	$84.47	$1,000
Gaffney	66	$2,780	$42.12	$0
Golden Strip Sunrise	15	$2,750	$183.33	$2,750
Greater Anderson	66	$11,865	$179.77	$5,000
Greenville	221	$54,031	$244.48	$5,000
Greenville Breakfast	16	$4,625	$289.06	$4,625
Greenville City Center	58	$7,206	$124.24	$2,500
Greenwood	115	$34,038	$295.98	$6,000
Greer	0	$0	$0.00	$0
Indian Land Lunch	28	$6,145	$219.46	$5,000
Lake Wylie	27	$4,273	$158.26	$2,500
Lancaster	55	$10,625	$193.17	$5,000
Lancaster Breakfast	52	$10,017	$192.63	$5,000
Laurens	46	$8,077	$175.59	$5,000
Mauldin	18	$6,172	$342.89	$5,000
Newberry	70	$15,220	$217.43	$5,000
North Augusta	21	$647	$30.81	$0
North Spartanburg	31	$4,276	$137.94	$2,500
Pickens	35	$3,225	$92.14	$1,000
Pleasantburg (Greenville)	40	$10,373	$259.33	$5,000
Rock Hill	64	$3,250	$50.78	$1,000
Seneca	37	$6,436	$173.95	$2,500
Seneca Golden Corner	22	$1,841	$83.66	$1,000
Simpsonville	41	$4,095	$99.88	$1,000
Spartan West (Spartanburg)	27	$3,175	$117.59	$2,500
Spartanburg	170	$8,523	$50.13	$1,000
the Reedy River Greenville	28	$15,325	$547.32	$8,000
Travelers Rest	14	$1,324	$94.57	$1,000
Union	34	$4,951	$145.62	$2,500
Walhalla	20	$825	$41.25	$0
Westminster	26	$2,220	$85.38	$1,000
Winnsboro	25	$1,573	$62.90	$1,000
York	30	$9,757	$325.23	$5,000

Use this form as a worksheet to begin collecting data about your grant *before entering* information into the online grant application on the District Website.

www.rotary7750.org then look under the Club Leader Library – Club President – District Grants

If you need assistance:

District Contact Bill Harley
P.O. Box 1627
Clemson, SC 29633
Home: 864-654-9927 Office: 864-653-7629
william.harley@firstcitizensonline.com

Important: Be sure you have reviewed "District Grants Guidelines" to ensure your grant meets the criteria for funding

Club Name
Project Title (5 words or less)
Project Description
Describe the project, its objectives, and how they will be attained.
Community or Neighborhood Served
Number of Beneficiaries
Stop here if the number of beneficiaries is low - your grant is unlikely to be funded. See District Grants Guidelines
Start Date
Anticipated Completion Date
Other Non-Rotary Organizations
If this project involves a cooperating organization, please provide the name of the organization, and attach a letter of participation from that organization that specifically states its responsibilities and how it will interact with Rotarians during this project.
Name of Organization
_____
NOTE: Rotary Organization's Letter of Participation. The application is not complete until receipt of that letter.
Rotary Clubs Involved in Project
Number of Rotarians Involved in Project

Rotary Branding
Describe prominence of the Rotary brand during and after the project. PLEASE refer to the **Rotary Brand Center** for correct use of the Rotary Brand. There are new brands and guidelines for appearance and placement. **https://brandcenter.rotary.org/**
Active Rotary Participation
Check the boxes demonstrating the active involvement of the Rotarians in this project. Assessment of needs and development of project plan
☐ Establishment of a committee of at least three Rotarians to oversee the expenditure of funds
☐ Involvement in the implementation of the project
☐ Provision of evidence of community involvement and ownership
☐ Organization of meetings with local service providers, local officials and/or recipients
☐ Promotion of the project to local media, club and district meetings
Describe Rotary's and Rotarians' involvement in the Project:
Project Budget
Include a complete itemized budget for the entire project
Ownership
Who will own the equipment, material or supplies purchased with grant funds? (Note: cannot be owned by a Rotarian or Rotary club.)
Who will be responsible for maintenance, operating expenses and storage costs of the equipment or supplies?
Proposed Financing
Please list all financing and indicate cash or District Grant fund amounts
Amount Contributing
Rotary Club $
D-7750 Grant Request $
Other Sources $
_____
Total Project Cost: $

"All or Nothing" *
Some clubs have stated that if the grant won't be funded 100% as proposed, they would not be able to do the project. If you prefer this grant be considered ONLY if 100% funded, check this box.
☐ All or Nothing - consider only if 100% funded
Grant Check should be sent to:
Name:
c/o Rotary Club of
Address:
City/State/Zip:
Phone:
Email:
Club President
(for upcoming Rotary year)
Name:
Address:
City/State/Zip:
Phone:
Email:
Club Foundation Chair
Name:
Address:
City/State/Zip:
Phone:
Email:

District Contact
Bill Harley
P.O. Box 1627
Clemson, SC 29633
Home: 864-654-9927
Office: 864-653-7629
william.harley@firstcitizensonline.com

District Grant Final Report Instructions

Preparing and submitting a District Grant report

Step 1: Complete each section of the attached form. Scan form and all receipts related to the project. **Complete this report within two weeks of project completion.**

Step 2: If necessary, follow up with project contacts to complete missing report information or to address eligibility issues. Please refer to the District Grant Eligibility Guidelines.

Step 3: Email scanned report, including receipts, with accompanying bank statement(s) to The District Grant Chair or the District Foundation Chair. Emails addresses can be found in the Resource Section of the District Foundation website.

Please note the following:

- Reports must be submitted using the form below. *Please type the report*. Retain a copy of the entire report for your records.

- Clubs should retain original receipts for all grant-funded expenditures and provide copies to the district. The district must maintain copies of all receipts related to grant-funded expenditures in accordance with local laws and for a period of at least five years following closure of the grant.

- Bank statements showing grant deposit and all expenditures related to the grant must be maintained by the club and a copy scanned and emailed as instructed above.

Individual District Grant Project Report

Fillable document on the District Website

Scan and return this completed form to either District Grants Chair or the District Foundation Chair. Email addresses can be found in the Resource section of the District Foundation website.

Rotary Club: _____

Project Title: _____

Progress report ☐ Final report ☐

Project Description

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

2. How many people benefited from this project? _____

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

4. How many Rotarians participated in the project? _____

5. What did they do? Please give at least two examples, not including financial support provided to the project.

6. If a cooperating organization was involved, what was its role?

Financial Report (District must retain receipts of all expenditures for at least five years)

Currency _____ Exchange _____ = 1 USD

7. Income

Sources of Income	Currency	Amount
1. District Grant funds received from the District		
2. Other funding (specify)		
3.		
Total Project Income		

8. Expenditures (please be specific and add lines as needed)

Budget Items	Name of Supplier	Currency	Amount
1.			
2.			
3.			
4.			
5.			
Total Project Expenditures			

Certifying Signature

By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

Certifying Signature _____ Date: _____

Print name, Rotary title, and club _____

To be completed by the District Rotary Foundation Committee Chair:

District Grant # _____ Individual Project Report # _____

District 7750 Sponsored Global Grants

Honduras	• Water projects: Copan, Santa Rosa & Marcala
Haiti	• Goat breeding and Avocado tree farm
Guatemala	• Chronic Childhood Malnutrition
Ethiopia (preparing to start 14 projects)	• World Vision water and sanitation projects in schools

Rotary's Commitment to the Environment

Rob Hanley – Environmental Committee Chair
Contact: dg2019@rotary7750.org

All six of Rotary's areas of focus are closely linked to the environment.

PROMOTING PEACE: The connections between the environment and peace are many and complex. Good management of ecosystems can lead to cooperative, resilient communities. Poor management of the environment undermines both natural and social systems. The resulting scarcities and competition for water and other natural resources can lead to increased insecurity, climate-induced migration, and refugees.

FIGHTING DISEASE: A healthy environment tends to lead to healthier people.
Investing in environmental sustainability can promote our well-being. The degradation of the environment — the air we breathe, the food we eat, the water we drink, and the ecosystems that sustain us — is responsible for an estimated 1 in 4 deaths across the globe.

PROVIDING CLEAN WATER AND SANITATION: Too many people in the world still lack access to safe drinking water, sanitation, and hygiene —basic elements of health and dignity. Effective management and protection of the environment is critical for successful water and sanitation programmes and can reduce risks to water supplies due to flooding, pollution, improperly managed sanitation, extreme precipitation events, and over extraction.

SAVING MOTHERS AND CHILDREN: Approximately 1.7 million children under five die each year from lower respiratory infections and diarrheal diseases. Cleaning up the environment reduces preventable and premature deaths, improves the health of the children who survive, benefits their mothers, and improves the well-being of the entire family.

SUPPORTING EDUCATION: Nature education creates better stewards of the air, land, water, and wildlife, which is critical for the sustainability of everyone's health. Young minds in well-nourished and healthy bodies are better able to benefit from education and literacy.

GROWING LOCAL ECONOMIES: Prudent environmental practices support industry, agriculture, and services to meet both current and future needs of a community. Tapping alternative energy sources to reduce energy poverty and support local economies is essential for progress in all of the other areas of focus. For example, strategic microfinancing enables a community to install and use a solar-powered grid. Communities and their economies flourish when the air and water are clean, and nourishing food promotes health.

In 2021 the Rotary Foundation Trustees and Rotary International Board of Directors added Supporting the Environment as Rotary's seventh are of focus.

Since then, $18.4 million in Rotary Foundation global grant funding has been allocated to environment related projects and have supported economic development, and water, sanitation and hygiene projects.
The District 7750 Environmental Committee is here to:

- Provide speakers.
- Work with your rotary club to develop and implement projects.

Rotarian Mark Makulinski has made $100,000 available to Rotary clubs in Districts 7750 and 7770 to match environmental projects. Step up and take advantage of this opportunity to get a project up and running.

What can your Rotary club do to support the environment?
Undertake activities that:

- Protect and restoring land, coastal, marine, and freshwater resources.
- Enhance the capacity of communities to support natural resource management and conservation.
- Support sustainable agriculture, fishing, and aquaculture practices.
- Address the cause of climate change by reducing the emission of greenhouse gases.
- Strength ecosystems and communities
- Support education initiatives that promote behavior that protects the environment.
- Advocate for sustainable consumption to build an economy that uses resources more efficiently.
- Address environmental justice issues and public health concerns.

My club wants to do a local project, any ideas?
Clemson University School Gardening for Educators (Grades K – 8):
Work with an elementary school to establish and maintain a raised bed garden. This Clemson Extension program provides gardening training, ongoing technical support and equipment that allows an elementary school to start and sustain a produce garden. The programs require at least two faculty to complete a fee-based, on-line course. Once completed, Clemson will provide equipment and supplies to build a raised-bed garden, including plant sets for the first quarter. Each following quarter, Clemson will send a new plant set.

What your Rotary club can do to get this project off the ground:

- Providing funds for teacher training and the initial equipment and supplies
- Providing manpower to build the raised bed garden.
- Providing manpower to harvest and plant.

Cost: $1,500 - $2,500 including training and initial equipment and supplies.

Timing: Best to have all training and funding in place so the garden can be built at the beginning of the fall semester.

Pollinator Habitat:

Did you know that approximately one third of the food that ends up on a plate is there because of pollinators? When pollination is mentioned, most people think of honeybees, but there are so many other insects that help get the job done such as native bees, beetles, flies, wasps, and butterflies.

What your Rotary club can do to build a pollinator habitat:

- Find a public space (school, park, church, *etc.*) where you can create the habitat.
- Prepare the soil.
- Plant native, pollinator friendly plants.
- Maintain the habitat (at least semi-annually, preferable quarterly) to control unwanted vegetation.

Cost: $1,500 - $2,500 including equipment and supplies. Cost will vary depending on plants selected and size of the habitat.

Timing: Can be done any time, but best to prepare the habitat in late fall or winter for spring growth.

Resources:

- District 7750 Environmental Committee
- Clemson Home and Garden Information Center
- SC Native Plants Society
- SC Wildlife Federation

Rain Gardens

A rain garden is a garden of native shrubs, perennials, and flowers planted in a small depression, which is generally formed on a natural slope. It is designed to temporarily hold and soak in rainwater runoff that flows from roofs, driveways, patios or lawns. Rain gardens are effective in removing up to 90% of nutrients and chemicals and up to 80% of sediments from the rainwater runoff. Compared to a conventional lawn, rain gardens allow for 30% more water to soak into the ground.

What your Rotary club can do to build a rain garden:

- Find a public space (school, park, church, *etc.*) where you can create the habitat.
- Prepare the soil.
- Plant appropriate native plants.
- Maintain the habitat (at least semi-annually, preferable quarterly) to control unwanted vegetation.

Cost: $5 - $7.50 per square foot of space. Cost will vary depending on plants selected and size of the habitat.

Timing: Can be done any time, but best to prepare the habitat in late spring or early summer.

Resources:

- District 7750 Environmental Committee
- Clemson Extension
- SC Native Plants Society

Weatherizing Homes

Weatherization is a process for retrofitting selected homes that consists of several stages to have the greatest overall impact on reducing energy bills for the family. Several funding sources are available, but before a home is approved to be worked on, the agency will perform a walk-through assessment to determine if there are any health and safety hazards or concerns.

What your Rotary club can do to weatherize a low-income house:

- Work with a local community action agency to identify and qualify a house.
- Supplement assistance if it doesn't provide 100% of costs.
- Provide person power to install weatherizing measures.

Cost: None if supported by local or state agency.

Timing: Can be done any time and total project length depends on the type of work and number of volunteers.

Resources:

- South Carolina Weatherization Assistance Program
- South Carolina Interfaith Power & Light
- Sustaining Way (Greenville area non-profit)

Adopt a Highway

Since 1987, Adopt-A-Highway volunteers have been cleaning up litter along South Carolina highways. Palmetto Pride administers the program. Clean communities are safe communities. Clean communities are good for tourism and economic development. Clean communities are a source of pride for all of us who call South Carolina home.

What your Rotary club can do to adopt a highway:

- Contact the Adopt a Highway Coordinator for your county (go to https://www.palmettopride.org/enforcement/county-information/ to find the coordinator in your county).
- Commit to quarterly adopt-a-highway cleanups
- Be safe and have fun.

Cost: No cost.

Timing: Quarterly clean-ups of the adopted highway

Resources:

- Palmetto Pride Adopt A Highway (https://www.palmettopride.org/get-involved/pickup-programs/adopt-a-highway/)

River Sweep Stream Clean-up

Out of sight out of mind is how waterways have been treated. Stormwater runoff carries trash into our waterways. Trash in our waterways is a threat to our favorite recreational activities - like swimming, boating, and fishing. Wildlife are harmed each year because they mistake litter and plastic debris for food or become entangled in ropes and lines. This year, the state-wide river sweep is scheduled for September 16, 2023.

What your Rotary club can do to adopt a stream:

- Contact Bill Marshall at 803.734.9096 (e-mail to marshallb@dnr.sc.gov) to identify a waterway to adopt and coordinate with South Carolina Department of Natural Resources.
- Announce your event to get volunteers
- Participate in the 2023 river sweep.

Cost: No cost.

Timing: September 16, 2023 (one-time event)

Please consider joining our Rotary Action Group https://esrag.org/

ESRAG (Environmental Sustainability Rotary Action Group) was formed to empower members of the **Rotary Family** worldwide to take actions to sustain our environment, particularly to stabilize our climate.
ESRAG provides an organizing point and informational resources to share information with clubs and communities about sustainable practices and the global humanitarian crisis of climate change.
Our action model: Identify environmental leaders within the Rotary world, assist them in initiating environmental service projects that are meaningful to THEM, help where we can, and acknowledge and publicize their awesome work.

Rotary Public Image and Public Relations

Maggie McMahon PI-PR District Chair
maggieamcmahon@gmail.com

A note from RI President Jennifer Jones

Nearly a decade ago, while I was the chair of the Strengthen Rotary's Brand Committee, we conducted in-depth research to better understand how the public viewed Rotary, our members, and our work. What we learned was that we needed to reposition the Rotary brand by focusing on clear, consistent messages and a unified visual identity.

Based on the committee's recommendation, the Board of Directors approved new brand guidelines, which included how clubs should use the Rotary logo. Simply put, club logos should include the club name either above or below the Rotary logo, like this:

Rotary Club of Winnipeg | Rotaract Club of London ONT | Interact Club of South African College High School

A brand is more than just a logo, but a logo is a big part of our visual identity. When the public sees it throughout their community, they begin to think of Rotary members as people of action. Using the same visual elements unites Rotary, Rotaract, and Interact and allows us, as a diverse global organization, to tell our story with one voice.

The RI Board of Directors is asking every club to update its logo to align with Rotary's brand guidelines. Help clubs in your district understand why we all need to use the Rotary logo correctly

- Show clubs how to create their own logo and use it consistently on their website, social media accounts, and other marketing materials, like banners, brochures, signs, and clothing

You can use the resources below, as well as those in the newly updated Brand Center, for assistance. I also encourage you to contact your Rotary public image coordinator and their team for additional guidance and support. They are eager to help.

This year, my Imagine Impact tour will highlight how Rotary members are creating positive, lasting change while it also introduces Rotary to new audiences and potential partners. This is where I need your help. **Think of how much more impact these stories will have when they're shared with one global voice!**

Let's continue to help our clubs attract the next generation of people of action as we increase our impact around the world.

Thank you for your support.
Jennifer Jones
RI President, 2022-23

Public Image and Public Relations

WE ARE ROTARY!
People of Action
Doing Good in the World
Service above Self

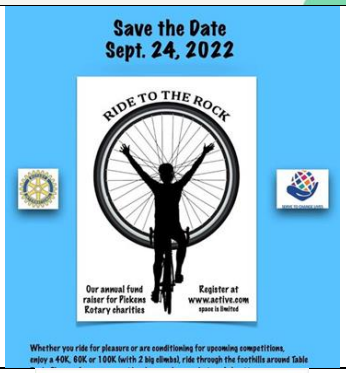
Brand refers to how an organization or product is perceived by those who interact with it. It also includes the way an organization makes people feel.

Increasing the public's understanding of our work helps Rotary expand its reach.
Telling the correct stories for an audience can help promote our brand and the value of membership.

The Rotary Brand Center is your GO TO resource for:
Branding ideas
Branding guidelines like color charts, fonts, ratios, etc
Telling your Rotary Story
Brochure Templates
Club Logo Templates
Rotary Partner logo Templates
Premade videos
And many more…
https://brandcenter.rotary.org/

Please be mindful of using the Rotary logo. The old Rotary wheel was retired in 2015 and should not be used.
The Rotary logo and Club Logos are easily created and downloadable in the Rotary brand center.
Also, be careful when using an outside vendor to create Rotary items. You should share with them the correct codes for the Rotary Colors and branding guidelines for using our logo.

Excellent example of use of the club logo. Download from the Rotary Brand center so that correct fonts and proportions are used	

Rotary wheel covered. Also must also have Master brand somewhere on the graphic. Wheel cannot be used alone. Wheel cannot be covered.	
Wrong Theme graphic. Wrong Rotary Wheel. No longer use the blue and gold. Them graphics are only for Internal Rotary communications. Incorrect out of Date Rotary Wheel. Needs to have the master brand on the page.	
Rotary wheel should not appear alone. The Masterbrand needs to be on the page too. If they were trying to use the master brand then the Proportions are wrong. Need to go to the Rotary Brand Center and download the correct Club brand logo	

Reach out to our District Public Image/Relations chair for assistance on using the Rotary logos in your club outreach.
For ideas on how to tell your Rotary Story to the community through social media and print.

Maggie McMahon
maggieamcmahon@gmail.com

Communication and Pmail in DACdb

Check your email address in DACdb

As companies are upgrading their Spam Filters, we are discovering that the group emails form DACdb are getting returned or you are not receiving these very important emails.

Please understand that DACdb is our districts most efficient method for communicating with our district officers as well as all our members.

We suggest that you review this information with all your club members.

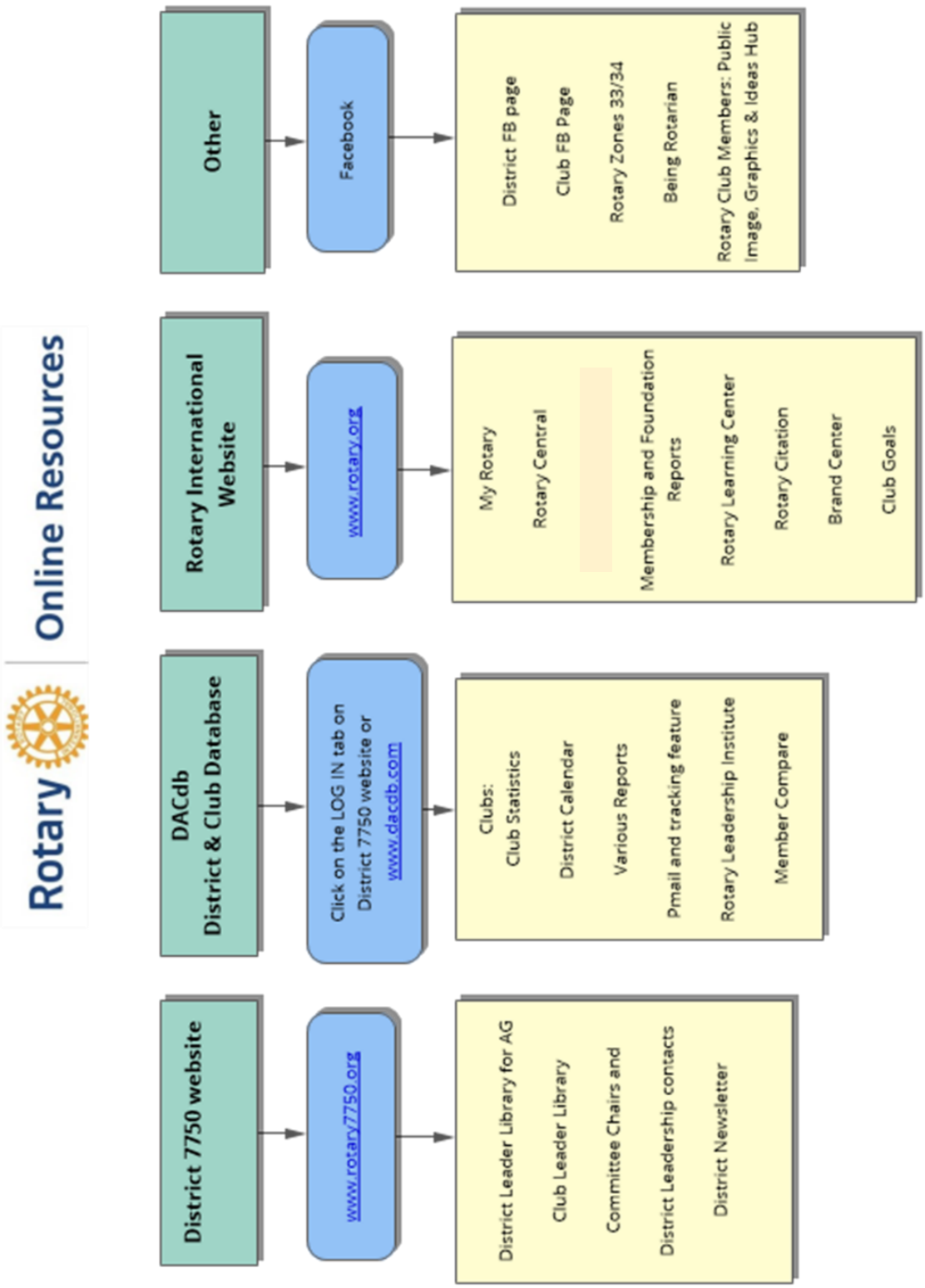
With this in mind, if possible, please do not use your business email address as your primary email Address.

Either change to another email address or create another one.

A few suggestions if you want to create a special email just for your primary DACdb email.

Rotarypres@gmail.com
Pres2023@outlook.com
Etc.

Online Resources



Appendix

Tax Information for Clubs:

your treasurer probably already knows this information.

As soon as a Rotary club is chartered by Rotary International, it automatically becomes an IRS-approved 501(c)(4) tax-exempt nonprofit organization, under RI's 501(c)(4) group umbrella. A club retains that status as long as its required version of the Form 990 tax return is filed each year with the IRS. If a club *loses* its 501(C)(4) tax-exempt status for failure to file its tax returns, unless the problem is remedied within a stated brief period of time, the club must go through the costly and time-consuming process to request its own 501(c)(4) determination letter from the IRS.

A 501(c)(4) tax-exempt status means a club does not have to pay taxes on its income. It does *not mean* that contributions to the club are *tax-deductible*. Only contributions made to a 501(c)(3) tax-exempt nonprofit organizations are tax-deductible. The problem with a Rotary club qualifying to become a 501(c)(3) is that IRS prohibits any of the income of a 501(c)(3) organization from ever being used in any way for the benefit of its members. This is the reason why some Rotary clubs create a club foundation and apply to have that determined by the IRS to be a qualified 501(c)(3) organization.

Both 501(c)(3) and 501(c)(4) organizations are required to file annual tax returns. For Rotary and Rotary-related organizations, whose fiscal year ends on June 30, the tax filing deadline each year is November 15.

U.S. Rotary club and district liability insurance program

Active U.S. Rotary clubs and districts and Rotaract clubs are provided with general liability ("GL") and directors & officers/employment practices liability ("D&O/EPL") insurance through the U.S. Rotary Club and District Liability Insurance Program ("Program"). The Program is financed by insurance assessments collected from U.S. Rotarians on the July Club Invoice.
To report an incident or claim, please email Rotary International Risk Management.
To obtain a certificate of insurance, insurance policies and summaries, loss prevention strategies, and more, please visit the insurance broker's website, Gallagher Insurance Website. Gallagher Insurance Website can be accessed with a username and password that have been emailed to your club and district officers through annual insurance e-mailings or you can contact Rotary International Risk Management.

If you have questions regarding coverage, please contact insurance broker, Gallagher:
Email: rotary@ajg.com
Phone: 833-376-8279
Website: https://rotary.ajg.com

ROTARY'S APPROACH TO CHANGE

ASSESS

Before any action is taken, the person leading the change should be able to describe the need for it. **What to ask:** What problem will the change solve? How will we determine if we've been successful? What are our goals? **What to do:** Understand the reasons for the change and write a statement about your objective that clearly describes the desired outcome.

DESIGN

Next, the person leading the change designs a strategy to accomplish it. **What to ask:** Who needs to be involved in developing or communicating the objectives that make the change necessary? What resources or tools might you need to be successful? Will there be a trial period for the new process or role? **What to do:** Define the scope of the project, assemble a team to help you implement the change, write a summary of the expected benefits or rewards, define what indicators you'll use to measure success, and decide what resources or tools you need.

BUILD

In this phase, the person leading the change creates the tools or resources listed in the strategy. Developing a detailed timeline and measurable milestones are also part of this phase. **What to ask:** How, and how often, should you communicate with the people who'll be affected by the change? Who needs training, and when? Do any new roles or changes to roles need to be defined? **What to do:** Create a communications and training plan. Create new role descriptions if necessary.

IMPLEMENT

Now that the change is being put in place, the person leading it needs to support the people affected by it, adjust benchmarks if necessary, and respond to any resistance. **What to ask:** Is the team you've assembled ready to lead the change? Are the people who will be affected prepared for it? **What to do:** Support people by using commitment, communication, and coaching strategies throughout the change. Seek feedback frequently and respond to resistance thoughtfully.

SUSTAIN

Ensure that the change will last. **What to ask:** Is there a plan to maintain this change after the team leading it disbands? **What to do:** Document any new policies, procedures, or job descriptions, and share the documentation so that people can access it. Conduct surveys or complete reviews to evaluate the process and document

what worked and what didn't.

DIVERSITY, EQUITY, AND INCLUSION CODE OF CONDUCT

This code of conduct reflects our core values and explains the responsibility that comes with being a Rotarian and Rotaractor, which includes members from nearly every country in the world, speaking more than 100 different languages. We are committed to upholding and evolving this code as our organization grows.

Like our core values, we expect Rotarians and Rotaractors to exemplify this code of conduct as they interact with one another, Rotary program participants, alumni, project partners, and members of the community. This code of conduct applies at all club, district, zone, and Rotary International meetings, trainings, events, and anywhere else a member represents Rotary and on My Rotary and social media.

EXPECTATIONS

All club members and other participants including Rotary program participants, alumni, project partners, and representatives of Rotary are expected to comply with this code of conduct, be considerate and contribute to a collaborative, inclusive, positive, and healthy environment in which all are respected and valued.

Use respectful language

- When you first meet someone, introduce yourself and explain how you would like to be addressed, including your preferred pronouns (he/him/his, she/her/hers, they/them/theirs). Call others by their preferred name, rather than using a nickname that is easier to pronounce.
- When addressing larger groups, utilize gender neutral words to avoid gender assumption.
- Use active listening to deepen your understanding of others.
- Be conscious of language use and adapt depending on region. Some wording is acceptable in some cultures but unacceptable in others.
- Avoid slang or idioms that do not translate across cultures or be deliberate in explaining them to share our diverse cultures and languages.
- Speak plainly and avoid acronyms and jargon that not everyone may understand.
- If you are curious about someone's cultural background, faith, sexual orientation, gender, or another characteristic, ask if they are open to sharing more about themselves. Refrain from asking if the topic is not relevant to your conversation.
- Foster an atmosphere of intergenerational dialogue and avoid describing anyone by their age.

Be supportive

- Be an ally and advocate for others and be ready to intervene when you see a need.
- If you see or hear something inappropriate, address the behavior in a way to offer support to those affected.
- As a member of Rotary, uphold the code of conduct, build this culture within your club experience, and address any issues as they arise.

Foster a welcoming and inclusive environment

- Ensure every member and participant can fully engage in any meeting, event, or activity that you organize in person or online by offering an accessible venue, simultaneous

interpretation, closed captioning and/or transcripts, and other resources as needed.
- Review any club or program traditions and stop or change activities that may be offensive or alienating to a specific group.
- Create a welcoming environment and include all in conversations, projects, and events.
- As much as possible, pay attention to nonverbal communication such as eye contact, facial expressions, tone of voice, personal space, gestures, and posture, and how it impacts your ability to engage with and relate to others.
- Know the important dates of various religions and schedule events and activities in a way that is inclusive and considerate of people who observe them.
- Be aware of people's dietary and health restrictions.
- Open opportunities for everyone to hold leadership roles in your club and district or engage with your community partners.

Celebrate diversity

- Increase your club's awareness, understanding, and acceptance of people with disabilities.
- Celebrate a variety of cultural events and religious observances, rather than continually conducting service projects or hosting events associated with a single culture or religion.
- Acknowledge and celebrate significant dates relevant to diversity.
- Avoid stereotyping and mocking any specific group.
- Acknowledge and celebrate different genders.

CODE OF CONDUCT QUESTIONS AND CONCERNS

For questions or concerns regarding the code of conduct or behavior that goes against the code of conduct, email dei.inquiries@rotary.org.

REPORT ADULT HARASSMENT ISSUES

Per the Rotary Code of Policies, Rotary currently maintains the following to report issues of harassment involving Rotarians or Rotaractors at meetings, events, or activities:

Rotary is committed to maintaining an environment that is free of any form of harassment, broadly defined as any conduct, verbal or physical, that denigrates, insults, or offends a person or group based on any characteristic* (age, ethnicity, race, color, disability, religion, socioeconomic status, culture, sex, sexual orientations, or gender identity).

If you are notified of any allegation of harassment involving an adult, or you feel you have been harassed, follow these steps:

1. If anyone's safety is in doubt, contact local law enforcement.
2. Notify a club officer (club president or secretary), district leader (district governor or district governor-elect), or zone leader (RI director).
3. Report the incident to Rotary International's Club and District Support team by contacting cds@rotary.org.
4. Any allegation of harassment or abuse that involves young people must be reported to Rotary International at youthprotection@rotary.org within 72 hours.

** Characteristics listed here are from the Rotary Code of Polices, Harassment-free Environment at Meetings, Events, or Activities. As the Rotary Code of Policies is updated, this Code of Conduct section will be updated.*

Rotary District 7750 | CREATE HOPE in the WORLD

our commitment to diversity, equity, and inclusion

Rotary

At Rotary, we understand that cultivating a diverse, equitable, and inclusive culture is essential to realizing our vision of a world where people unite and take action to create lasting change.

We value diversity and celebrate the contributions of people of all backgrounds, across age, ethnicity, race, color, disability, learning style, religion, faith, socioeconomic status, culture, marital status, languages spoken, sex, sexual orientation, and gender identity as well as differences in ideas, thoughts, values, and beliefs.

Recognizing that individuals from certain groups have historically experienced barriers to membership, participation, and leadership, we commit to advancing equity in all aspects of Rotary, including in our community partnerships, so that each person has the necessary access to resources, opportunities, networks, and support to thrive.

We believe that all people hold visible and invisible qualities that inherently make them unique, and we strive to create an inclusive culture where each person knows they are valued and belong.

In line with our value of integrity, we are committed to being honest and transparent about where we are in our DEI journey as an organization, and to continuing to learn and do better.

Rotary Online Resources

District 7750 Website - www.rotary7750.org

The public can access the District 7750 Website
Important items here are:

- District Leadership
- District Committees and Committee Chairs
- Club Leader Library with important forms and reports
- District Leader Library with important forms and information for Assistant Governors and other District Leaders
- District Newsletter
- Other information pertaining to the district and Rotary International

DACdb – District and Club Database

Access by **clicking the LOG IN** tab on the District Webpage or **www.dacdb.com**
Requires a **member log in**.

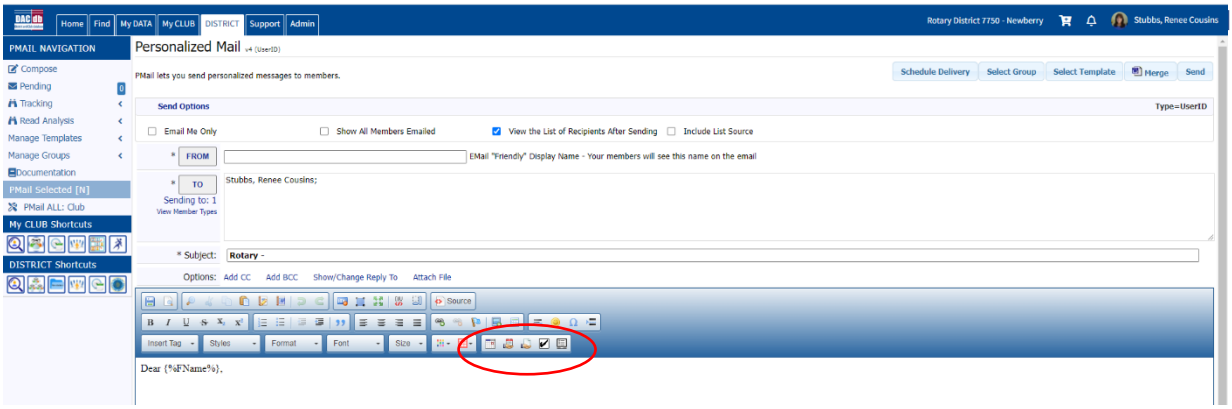
Important Items in DACdb:

- Pmail
- Club Statistics
- MAP membership tool
- District Calendar
- Various Reports
- Rotary Leadership Institute

Pmail

Log in to **DACdb**
Select the **District Tab**
Click on the **PMAIL Icon**
Complete the blanks in the form field

From: Your Name
To: Click on the **To box** and select the group or person to send the Pmail to from the drop-down list
Subject: Enter the Subject of the email
Leave the Dear {%FName%} in place on the email as this is where the program will insert the receiver's name.
Type the commentary for the Pmail



The 4 icons circled in Red can be very helpful

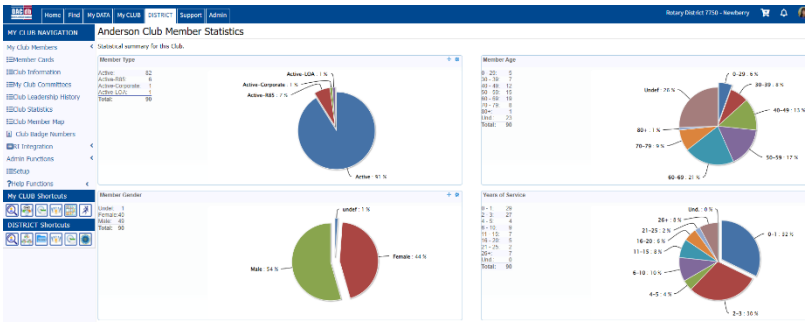
The **hand with a little calendar** will allow a **registration Link** to be inserted in the email. This is a personal link only for the recipient of the pmail.
Click Send in the upper right corner to send immediately
Click **Schedule Delivery** to **send at an alternate time**

Tools in the Left Navigation
Tracking – After the pmail is sent Tracking will allow to view the recipients who have opened the email. Caveat here is that some email providers block this activity, so the tracking is not always as accurate as it appears.
Read Analysis - This report shows all members that have been sent a a Pmail in the past **90 days**. Each member's reading habits are detailed to the right of their name, including the percentage of Pmails they have read as well as the average time it has taken them to read their Pmails.
The read rate is approximate. Many factors, including off-line viewing, security settings of the reader and network problems at the reader's end affect whether we can tell if a Pmail has been 'read'.
Use this data as guidance, not gospel.

Club Statistics

Log in to DACdb

Click on the name of a club. There are several ways to look up a club.
the easy way is to:
Select the **District Tab**
Select the **Area Icon**
Click on the **Club Name**



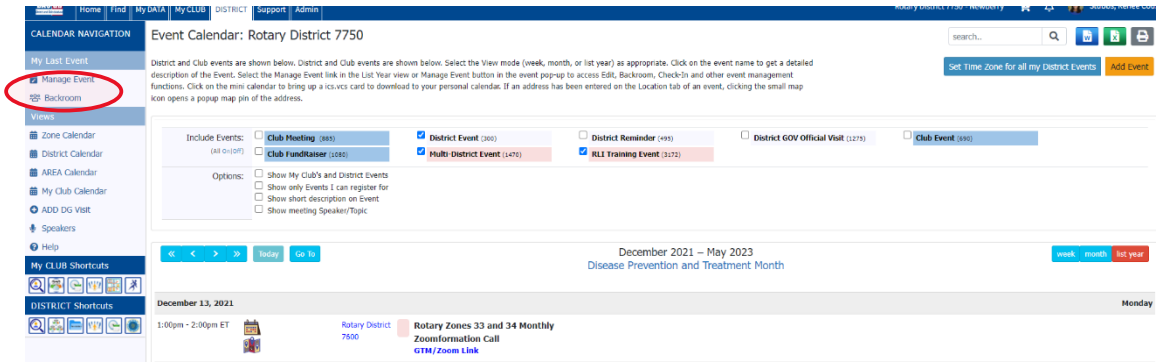
In the **left navigation** click on **Club Statistics**
Four Charts will represent the membership data about a club.
This is good for a quick reference about the demographics of a club.

District Calendar

Log in to **DACdb**
Select the **District Tab**
Click on the **Calendar Icon**
Use the **check boxes** at the top to sort the events.
Add events by clicking on the **Add Event** box at the top right on the screen

Encourage clubs to add their service projects, meeting times and online meeting links

The **Back Room feature** allows for being able to see who has registered



District reports

Log in to **DACdb**

Select the District Reports

This is pretty much a list similar to the reports from the District website.

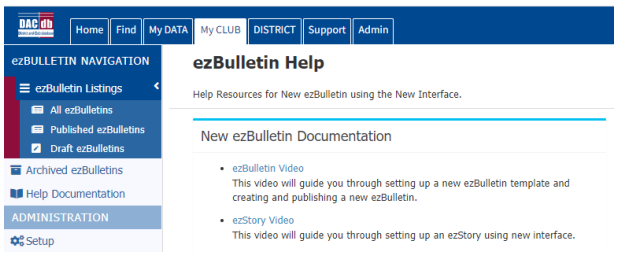
Other Items in DACdb that can be very useful

Club Easy Story

Club Easy Bulletin

These items are great for club communication.

Club Files is a great secure place to keep club document and save Club Institution Memory for Projects, committee descriptions, etc



The **Help Videos** guide the user on how to use these tools.

Rotary International Website – www.rotary.org

Everything on this website is important

Here are a few locations for AGs

- My Rotary
- Rotary Central
- Club Goals
- Club Quarterly Reports
- Membership and Foundation Reports
- Rotary Learning Center
- Presidential Citation
- Brand Center

My Rotary

Go to the RI Website www.rotary.org
Click on My Rotary
Click **Sign in** to My Rotary
Complete the Username and Password that is used to sign in to DACdb or create a new Password

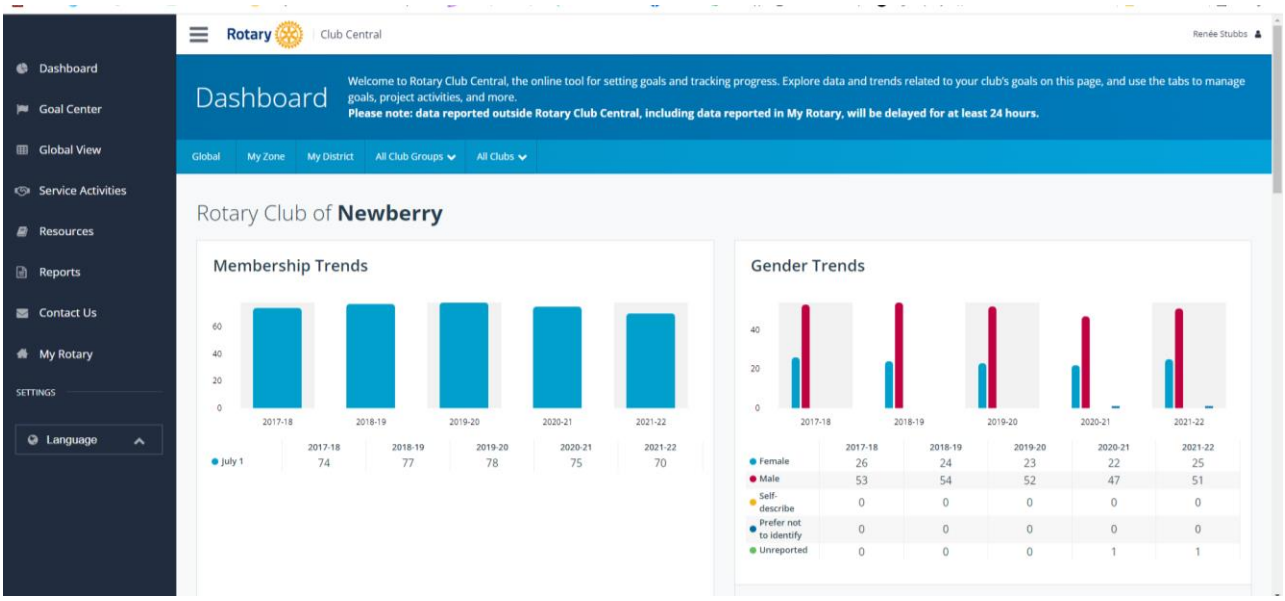
This is an area of the website that only Rotarians can access

***** The following sections of My Rotary will be of Special Interest to AGs**

Rotary Club Central

www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **Club Administration** and then **Rotary Club Central** from the drop-down links

The **Dashboard** appears on the page



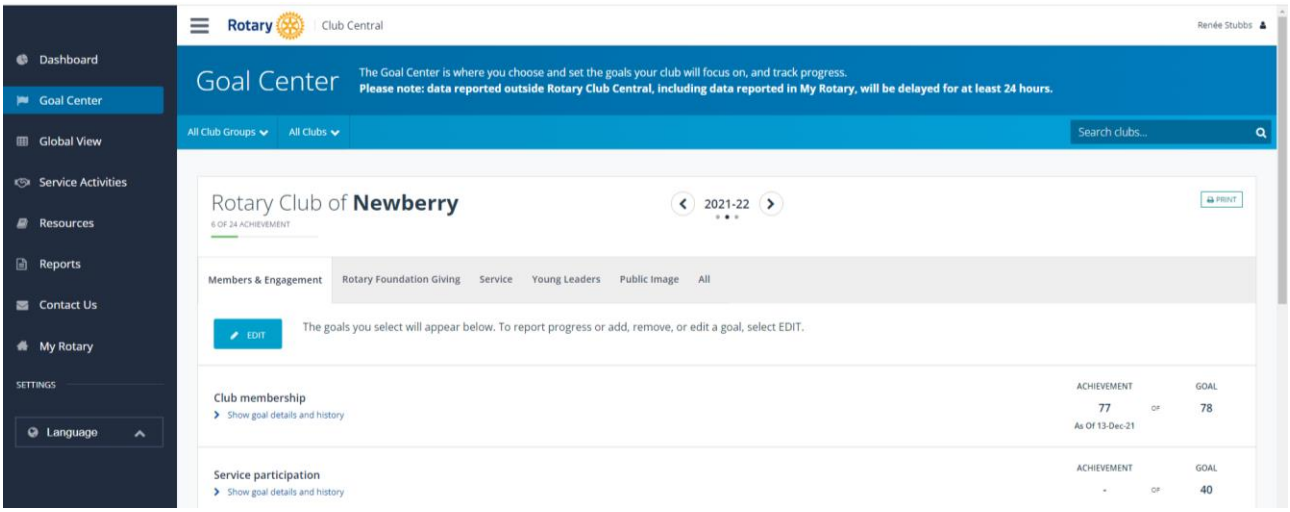
Use the tabs: to view membership trends and demographics as well as Annual giving.

Use the **left column navigation** to view the following.

Goal Center

www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **District Administration** and then **Rotary Club Central** from the drop-down links
Click on Goal Center

The Goal Center is where **club presidents** choose and set the goals the club will focus on, and track progress.



Click on the **horizontal tabs:**
Members and experiences,
Rotary Foundation Giving,
Service,
Young Leaders,
Public Image,
to select the area to enter the goals
Click Edit to edit the goals.

Resources – Resources for help with Rotary Central items
www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **District Administration** and then **Rotary Club Central** from the drop-down links
Click on **Resources** in the **left navigation**

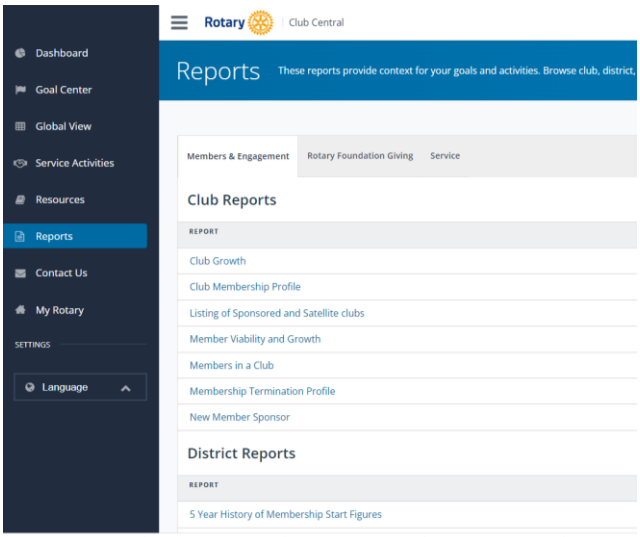
- Step by step guides for viewing and entering information in Rotary Central
- Membership resources like the Club Health Check survey, Membership development resources and more
- Public Image Resources
- Service Resources
- Foundation Giving Resources

Reports

www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **Club Administration** and then **Rotary Club Central** from the drop-down links
Click on Reports in the left navigation.

Click on the horizontal tabs to see Members and Engagement, Foundation Giving or Service

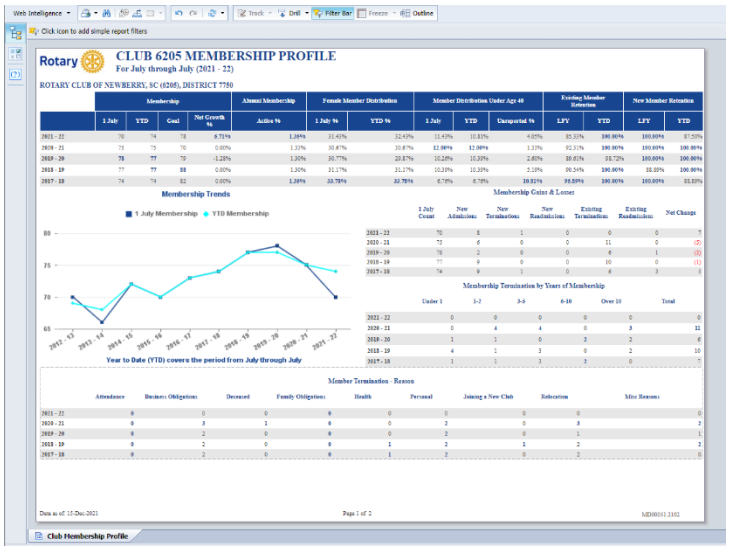
Rotary District 7750 | CREATE HOPE in the WORLD



These reports take **several seconds** to be generated. They open in a second window.
Be patient while the little wheel spins.

Membership tab – after going to reports above

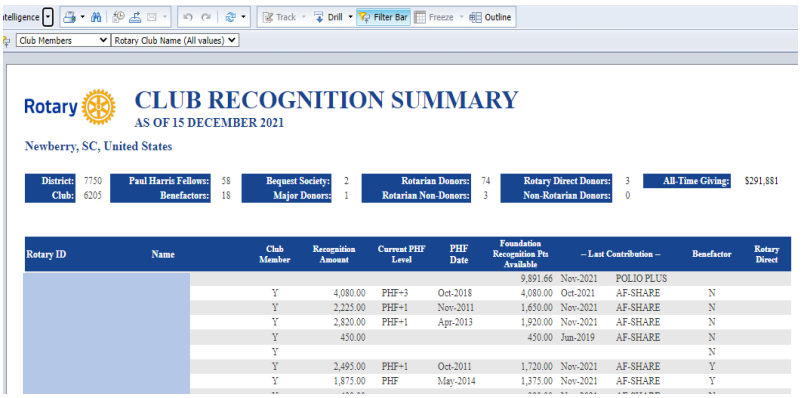
Club Membership Profile
Click on a month like July and **click the little arrow** to send it over then **click OK** and wait for the report to generate.



Rotary Foundation Giving tab – after going to reports above

The Rotary Foundation

Club Recognition Summary
This report summarizes the Number of PHF, Benefactors etc.



There are other reports as well.

Other Reports of Interest

Log in to My Rotary
Select Manage tab

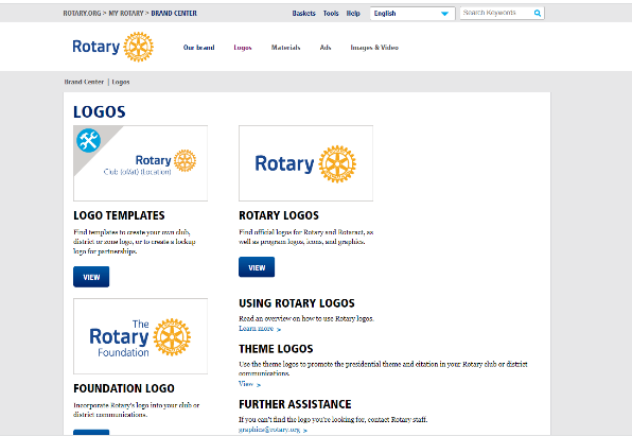
Select Club and District Reports form the drop down followed **by Reports** in the second drop down menu

Rotary Citation can be found near the bottom of the list **under Awards**
Individual Donor Report – Only gives your personal Donor history
Status of Club Members – A report of members who have logged in to My Rotary and have accounts.

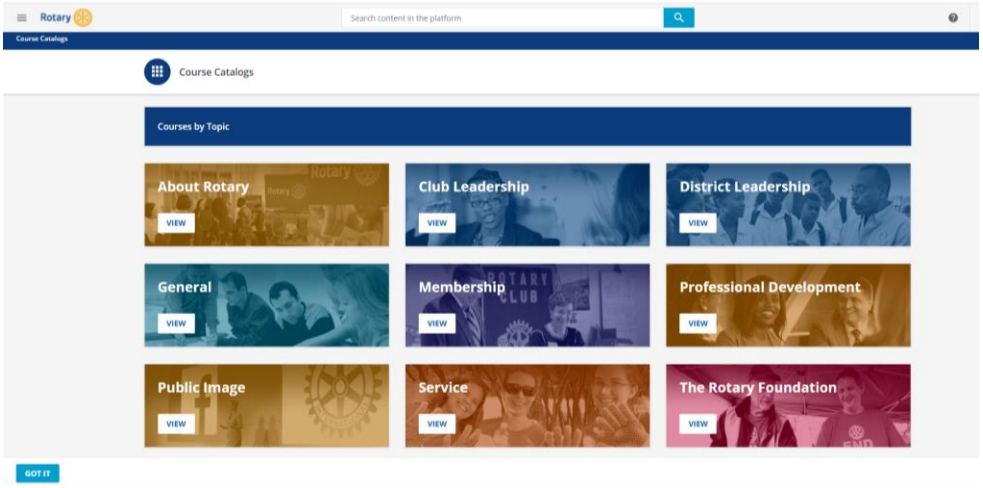
Rotary Brand Center

Log in to **my Rotary**
Select the **Manage tab**
Select **Brand Center** from the Drop-Down menu

- Learn about the Rotary Brand and why using the brand correctly is essential to our organization.
- Create Club Logos using the Rotary brand
- Create Club brochures and materials
- See marketing materials like videos and ads



Rotary Learning Center

Log in to **My Rotary**
Select Learning and Reference tab
Select Learning Center from the Drop Down

Select the virtual courses to enroll in