LONE STAR P.E.T.S. 2020

Rotary Opens Opportunities

February 27-March 1, 2020

PRESIDENTS NOMINEE FACILITATOR GUIDE

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

Dear President Nominee:

Congratulations on your selection as the 2021-2022 president of your Rotary club.

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

1. Reach out to the former presidents in your club. They can assist you as mentors.

2. Develop a good relationship with your president elect. Working together you can develop a continuity of programs and goals for your club.

3. Participate in each of your district's various training sessions and events. You will develop a broad knowledge of the many Rotary programs in which your club members may wish to participate.

4. Visit other clubs and see how they operate. Every Rotary club is different. You may see how other clubs solved a problem your club might be facing.

5. View the Learning Center training videos on the Rotary International website.

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

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

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

Yours in Rotary,

John

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

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

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

Notes to District Presenters:

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

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

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

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

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

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

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Table Facilitator Instructions
Session A-1 Becoming a Vibrant Club Leader

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

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

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

Overview of Table Facilitator Role:

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

   (Note: Add your own perspective if needed to stimulate discussion. We want to raise awareness and get them engaged, so mostly ask the questions, listen, and encourage the discussion)
4. **Capture 1 or 2 good ideas and share briefly if called upon**

Table Discussion:

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

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

FRIDAY, FEBRUARY 28, 2020

SESSION A-1 BECOMING A VIBRANT CLUB LEADER

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

CREATING YOUR CLUB LEADERSHIP PLAN

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

Rotary Club of **Rotary Year**

☐ Our club has a strategic plan that reflects what we want our club to be like in three to five years

☐ Our club is engaging. We use the following meeting formats:
- ☐ Traditional meetings: /month
- ☐ Online meetings: /month
- ☐ Service meetings: /month
- ☐ Social events: /month
- ☐ Other:
- ☐ Other:

☐ Our club ensures continuity:
- ☐ Members prepare for leadership positions
- ☐ Past, present, and future leaders participate in making decisions

☐ Our club has fun social activities planned for the year:
- ☐ Networking and socializing events
- ☐ Events that welcome families

☐ Our club has a comprehensive training plan that includes:
- ☐ District conference
- ☐ District membership seminar
- ☐ District public image seminar
- ☐ District Rotary Foundation seminar
- ☐ New member orientation
- ☐ Online courses on the Learning Center
  - ☐ Club Officers Basics course
  - ☐ Membership online course☐
- ☐ Presidents-elect training seminar

☐ Our club has entered its annual goals in Rotary Club Central

☐ Our club has a communication plan for members and for the community:
- ☐ We use social media tools like Facebook
- ☐ Our club website is active and current
- ☐ Other:
- ☐ Other:
- ☐ Other:

☐ Our club's bylaws are current and reflect our structure and practices

☐ Our club has strategies for keeping all members active in the club:
- ☐ Members are involved in projects
- ☐ New members are assigned mentors

☐ Our club has committees that support our needs:
- ☐ Administration
- ☐ Membership
- ☐ Public relations
- ☐ Rotary Foundation
- ☐ Service
- ☐ Other:
- ☐ Other:
- ☐ Other:

Newsletters

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

MANAGE SUBSCRIPTIONS

End Polio Now

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

Giving & Grants

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

Membership Minute

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

Peace in Action

A forum for the Rotary Peace Centers community.

Rotary Convention

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

Rotary Leader

Practical information to help club and district leaders achieve success.

Rotary Service

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

Rotary Weekly

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

Rotary Youth Exchange

Information and updates on current Youth Exchange events and resources.

The Rotarian Newsletter

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

Training Talk

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

Vocational Service

News and resources related to vocational service.

Young Leaders in Action

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

Notes

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

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

Notes to District Presenters:

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

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

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

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

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

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

Overview of Table Facilitator Role:

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

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

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

Table Discussion: (25 Minutes)

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

Lone Star P.E.T.S. 2020

P R E S I D E N T S - N O M I N E E W O R K B O O K

FRIDAY, FEBRUARY 28, 2020

SESSION A-2 STRIVING TO BE A VIBRANT ROTARY CLUB

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

STRATEGIC PLANNING GUIDE

Rotary

ROTARY'S VISION STATEMENT

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

ABOUT THIS GUIDE

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

Use this Strategic Planning Guide to help you set long-term priorities as well as annual goals that support your club's strategic vision. This guide is designed for Rotary and Rotaract clubs, but districts may also find it useful.

STRATEGIC PLANNING PROCESS OVERVIEW

PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?	PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?	PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?	PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?
• Identify strategic issues to address • Determine club's strengths and weaknesses • Assess member satisfaction and needs • Identify opportunities and challenges in the community	• List five to seven characteristics you want your club to have • Create a vision statement	• Set strategic priorities • Set annual goals • List the activities, timeline, and resources you'll need	• Monitor progress toward your annual goals • If you missed your targets, determine why • Adjust your action plans

GETTING STARTED

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

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

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

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

IDENTIFY STRATEGIC ISSUES

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

Potential questions to ask your members:

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

TIP

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

STRATEGIC ISSUES

STRENGTHS AND WEAKNESSES

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

STRENGTHS

WEAKNESSES

TIP

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

IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

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

OPPORTUNITIES

CHALLENGES

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

CLUB CHARACTERISTICS

Rotary's vision statement asks us to "unite and take action to create lasting change." List five to seven characteristics you want your club to have within three to five years that will help realize that vision, e.g. fun, service-oriented, innovative, representative of the community, etc.

CHARACTERISTICS

VISION STATEMENT

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

Potential questions to consider:

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

TIP

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

VISION STATEMENT

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

STRATEGIC PRIORITIES

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

Consider the following when you develop strategic priorities:

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

STRATEGIC PRIORITIES

ANNUAL GOALS

When you have set your strategic priorities, you can develop yearly goals that support them.

Write down your strategic priorities. Then list your annual goals, along with the actions you'll take, the resources you'll need, and who will lead the effort to meet each goal. Set a timeline for each. Rotary Club Central can also assist you in setting goals and tracking achievements.

TIP

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

STRATEGIC PRIORITY 1: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

STRATEGIC PRIORITY 2: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

STRATEGIC PRIORITY 3: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

STRATEGIC PRIORITY 4: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

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

MONITOR PROGRESS

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

Consider the following when monitoring progress:

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

TIP

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

GOAL PROGRESS REVIEW PLAN

REVIEW AND ADJUST

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

Consider the following when identifying and listing your missed targets:

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

STRATEGIC PRIORITY 1: _____

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

STRATEGIC PRIORITY 2: _____

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

STRATEGIC PRIORITY 3: _____

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

STRATEGIC PRIORITY 4: _____

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

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

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

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

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

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

SERVICE | Goal and Achievement is set as a #

Service projects

YOUNG LEADERS | Goals and Achievements are set as a #

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

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

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

ROTARY CITATION | Goals are set as a #, Achievement are set as a # or no/yes
Club Membership Committee (no/yes)
Conduct a member classification survey (no/yes)
Alumni networking event (no/yes)
Club Foundation Committee (no/yes)
Polio fundraising or event (no/yes)
Service project in an Area of Focus (no/yes)
Post successful club projects (no/yes)
Collaboration with non Rotary partner (no/yes)
Club members talking with media (no/yes)
Connect families (no/yes)
Connect professionally (no/yes)
Connect community (no/yes)

Message from the Strategic Planning Committee

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

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

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

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

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

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

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

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

ROTARY'S VISION STATEMENT

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

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

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

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

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

EXPAND OUR REACH

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

ENHANCE PARTICIPANT ENGAGEMENT

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

INCREASE OUR ABILITY TO ADAPT

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

ROTARY'S CORE VALUES

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

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

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

Rotary

rotary.org/strategicplan

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A Changing Rotary For A Changing World

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

From Rotary International General Secretary John Hewko

Building a stronger Rotary

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

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

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

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

Working closely with Rotaract

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

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

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

The digital experience

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

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

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

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

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

Serving our communities

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

Making progress to end polio

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

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

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

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

Funding your global projects

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

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

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

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

Supporting The Rotary Foundation

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

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

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

Partnering for impact

Rotary has developed **partnerships** with many organizations, expanding our reach and opportunities to serve.

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

Working for peace

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

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

Telling our story

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

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

Rotary in the media

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

Engaging social media

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

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

Notes

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

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

Notes to District Presenters:

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

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

Lone Star P.E.T.S. 2020
Table Facilitator Instructions
Session A-3 Growing and Engaging Your Club Membership

Overview of Table Facilitator Role:

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

Table Discussion: (30 Minutes)

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

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

FRIDAY, FEBRUARY 28, 2020

SESSION A-3 GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

MEMBERSHIP RESOURCE GUIDE

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

PUBLICATIONS		
Name	**Description**	**Audience**
Strengthening Your Membership	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
Starting a Rotary Club	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors
Introducing New Members to Rotary	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
Be A Vibrant Club	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership
Connect for Good	Eight-page guide shows how to get involved and connect with Rotary.	Current members
Rotary Basics	This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.	New members
Impact Begins With You*	This prospective member brochure explains who we are and what sets us apart from other organizations. *Hard copies are available through shop.rotary.org until March 2020 [SKU 001]	Prospective members

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

Kick-start Your New Member Orientation	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
Practicing Flexibility and Innovation	If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them.	Rotary members
Building a Diverse Club	A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members.	Rotary members
Online Membership Leads	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members
Is Your Club Healthy?	Take this course to help your club stay valuable to your members and your community.	Rotary members
Strategies for Attracting New Members	Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors.	Rotary members
How to Use the Program Participants and 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

TOOLS		
Name	**Description**	**Audience**
Membership Best Practices Discussion Group	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
Rotary Club Health Check	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders
Membership Assessment Tools	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
Customizable Rotary Club Brochure	In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials.	Prospective members
How to Delegate Your Online Access	As a club or district officer, you can temporarily delegate your level of access in My Rotary to another member for assistance in managing Rotary business online.	Club and District leaders

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

Club Membership Committee Checklist	Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives.	Rotary members
Engaging Young Professionals Toolkit	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
Updated! State of Rotary's Membership power point	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
Club Flexibility web page	This web page offers ways clubs can implement the new flexible options Council decisions granted them. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members
"Discover Rotary" Power Point	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
Understanding Membership Reports: Getting Started	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members
Creating a Positive Experience for Prospective Members	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members
Proposing New Members	Best practices for proposing new members to your club.	Rotary members
How to Manage Membership Leads (Clubs)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders
How to Manage Membership Leads (Districts)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders
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, and Proud Member window cling. *Hard copies are available through shop.rotary.org until March 2020 [SKU:426]	New members
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders
Strategic Planning Guide	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders

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

Building New Clubs Together	This webinar will be helpful if you believe that adding a new Rotary club in your community will broaden your capacity for service, think a satellite club may allow more prospective members to engage with Rotary, or want tips on how to charter a Rotaract club, or encourage Rotaractors to start their own clubs.	Rotary members
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
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
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
Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members
New! We Are Rotary: Advancing Women as Leaders	Less than 25 percent of Rotary's members around the world are women, and women are underrepresented in leadership positions at every level. Watch this presentation to learn the benefits of being a diverse, equitable, and inclusive organization and the barriers that women face when they consider leadership positions.	Rotary members
New! State of Membership Webinar	Rotary's members are our greatest assets! When our membership is strong, our clubs are more vibrant, and Rotary has greater visibility and our members have more resources to help communities flourish. Watch to see updates on how we got here, who's joining, who's leaving, and opportunities for us to all make membership a top priority.	Rotary members

TRAINING MANUALS & DOCUMENTS		
Name	**Description**	**Audience**
District Membership Seminar Leader's Guide	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
District Membership Committee Terms & Responsibilities	This sheet explains the district membership committee's purpose, chair appointment, qualifications, duties, and responsibilities.	District leaders
Lead Your District: Committee Chair	Use this manual to set up and run an effective district committee	District leaders

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

Rotary International Harassment Policy

What is harassment?

Rotary has a harassment policy to ensure that we provide a safe, fun, and inclusive environment for all. It defines harassment as any conduct — verbal or physical — that denigrates, insults, or offends a person or group based on characteristics that include age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.
Harassment can take many forms. When a behavior becomes pervasive or extreme, it is harassment. Here are some examples:

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

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

Creating a harassment-free environment

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

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

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

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

What to do if you're harassed

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

As a reminder, any allegation of harassment involving our youth must be reported to Rotary International at youthprotection@rotary.org within 72 hours.

How to handle reports of harassment

Allegations of harassment should be taken seriously every time.

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

Additional Resources:

The Rotary Learning Center- Preventing and Addressing Harassment
https://learn.rotary.org/members/learn/course/575/PreventingandAddressingHarassment
Rotary Code of Policies- Article 26.120. Harassment-free Environment

ROTARY CLUB HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

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

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

Rotary

YOUR CLUB EXPERIENCE

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

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

SEE THE FOLLOWING PAGE FOR YOUR PROGNOSIS

PROGNOSIS

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

PROBLEM AREA	PRESCRIPTION
Club meetings	⊕ Change the meeting format or style. For ideas, see **Lead Your Club: President**, chapter 2, and **Be a Vibrant Club's** "Ideas to try." ⊕ Find out what your members want using the **Member Satisfaction Survey** and then give them that experience. ⊕ Develop leadership skills among club leaders and members by holding a **leadership skills training**.
Rotary experience beyond the club	⊕ Sponsor an **Interact** or **Rotaract** club, **organize a RYLA event**, **create a scholarship**, or **start an exchange**. ⊕ Join a **Rotary Fellowship** or **Rotarian Action Group**. ⊕ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience. ⊕ Promote the work that Rotary does globally, including polio eradication, by showing a short **Rotary video** or projects on **Rotary Showcase** during a club meeting.

SERVICE AND SOCIALS

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

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

PROGNOSIS

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

PROBLEM AREA	PRESCRIPTION
Opportunities for service	⊕ Sponsor an **Interact** or **Rotaract** club, **organize a RYLA event**, **create a scholarship**, **start an exchange**, join a **Rotarian Action Group**, or **support the Rotary Peace Centers**.
Quality of projects	⊕ Use **Community Assessment Tools**, **Guide to Global Grants**, and **Rotary Ideas** to improve the quality of your projects.
Social activities	⊕ Put one or two members in charge of organizing socials throughout the year. ⊕ Join a **Rotary Fellowship**.
Leadership	⊕ Hold a **leadership training**.

MEMBERS

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

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

PROGNOSIS

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

PROBLEM AREA	PRESCRIPTION
Member diversity	⊕ Take action to diversify your club using **Diversifying Your Club: A Member Diversity Assessment**.
Professional diversity	⊕ Make your club a microcosm of your community with **Representing Your Community's Professions: A Classification Assessment**.
Stagnant or declining membership	⊕ Create a membership development plan with **Strengthening Your Membership**. ⊕ **Connect to Membership Leads** assigned to your club using **How to Manage Membership Leads (For Clubs)** and **resources for prospective members**. ⊕ Target prospective members using this **exercise**. ⊕ Show members how to **propose new members** to their own club and explain that they can **refer** qualified prospects to other clubs.
Members leaving	⊕ Start with the **Member Satisfaction Survey** to enhance current members' experience. ⊕ Learn and act on trends using the **Retention Assessment and Analysis**. ⊕ Use the **Exit Survey** to understand why members resign. ⊕ Let resigning members know they can **rejoin or change clubs** when they are ready.
Orientation and Rotary knowledge	⊕ Offer **new member orientation**, **leadership development**, and ongoing learning opportunities with Rotary's **Learning Center**.

IMAGE

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

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

PROGNOSIS

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

PROBLEM AREA	PRESCRIPTION
Community awareness	⊕ Use the resources in Rotary's **Media Center** and use them in your community's media. ⊕ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's **Brand Center**.
Outdated materials	⊕ Find customizable club brochures and membership materials on Rotary's **Brand Center**. ⊕ Follow the **Voice and Visual Identity Guidelines** in any materials your club creates. ⊕ Use **Rotary Images** and **Rotary videos**, as well as images of your members, in your materials.
Online presence	⊕ Find a tech-savvy member to create and manage your club website and social media pages. ⊕ Take the social media course in the **Learning Center**. ⊕ Use **Rotary Images** and **Rotary videos**, as well as images and videos of your own members. ⊕ Share your projects on **Rotary Showcase**.
Marketing expertise	⊕ Find tips in **Lead Your Club: Public Relations Committee** and put members with public relations expertise on the committee. ⊕ Recruit professionals with marketing expertise using ideas from **Finding New Club Members: A Prospective Member Exercise**. ⊕ Build your own social media expertise using the Social Media Toolkit in Rotary's **Brand Center**.

BUSINESS AND OPERATIONS

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

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

PROGNOSIS

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

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	⊕ Create a vision for your club and set long-range and annual goals using the **Strategic Planning Guide**. ⊕ Track your annual goals in **Rotary Club Central**. ⊕ Use **Strengthening Your Membership** to make a membership development plan.
Innovation	⊕ Ask members for input using the **Member Satisfaction Survey**, and try their ideas. If they're successful, edit your club bylaws accordingly. ⊕ Use templates in the **Brand Center** to create your own materials.
Processes	⊕ Develop standard processes for **new members**, **prospective member follow-up**, **proposing a new member**, leadership continuity, etc.
Leadership	⊕ Find tips and resources in Lead Your Club: **President**, **Secretary**, and **Treasurer**. ⊕ Offer leadership development opportunities and promote self-paced learning with Rotary's **Learning Center**.
Managing funds	⊕ Use **The Rotary Foundation Reference Guide** to learn about giving options. ⊕ Find best practices in **Lead Your Club: Treasurer**.
Managing your club on MyRotary	⊕ Use the **Club Administration** section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.

WHAT'S NEXT?

Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas. Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

FEATURED RESOURCES

Membership Assessment Tools

Membership resources

Brand Center

Learning Center

Rotary videos

417-EN—(1217)

YOUR MEMBERSHIP PLAN WORKSHEET

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

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

Step 1: Evaluating Your Club

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

Area for improvement	Remedy we plan to try

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

_____

_____

_____

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

_____

_____

_____

☐ Our club completed the classification assessment and plans to do the following to better represent our community's professional diversity:

Step 2: Creating a Vision for Your Club

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

In 3-5 years, our club will:

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

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

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

Step 3: Attracting New Members

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

☐ Our club completed the Finding New Club Members exercise and will take these actions to find prospective members:

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

_____

_____

_____

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

_____

_____

_____

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

- ☐ Our club leaders have determined who will manage membership leads assigned to our club.
- ☐ Our club has a process for following up with prospective members assigned to us through the membership leads program.

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

Step 4: Engaging Your Club's Members

☐ Our club has asked members to complete the member satisfaction survey and decided to implement the following changes based on the results:

_____

_____

_____

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

☐ Our club completed the retention assessment and analysis, discussed the results, and will take these steps to improve our engagement and retention:

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

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

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

Member groups	Strategy

Step 5: Improving Your Public Image

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

_____

_____

_____

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

_____

_____

_____

Step 6: Supporting New Clubs

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

Step 7: Supporting Your Club: Rotary Resources and Tools

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

Notes

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

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

Notes to District Presenters:

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

Lone Star P.E.T.S. 2020
Table Facilitator Instructions
Session A-4 Increasing Humanitarian Service By Supporting Our Foundation

Overview of Table Facilitator Role:

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

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

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

Table Discussion: (30 Minutes)

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

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

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

FRIDAY, FEBRUARY 28, 2020

SESSION A-4 INCREASING HUMANITARIAN SERVICE BY SUPPORTING OUR FOUNDATION

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

ROTARY'S AREAS OF FOCUS

Rotary

TAKE ACTION: www.rotary.org

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

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

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

ROTARY FOUNDATION GLOBAL GRANTS AND THE AREAS OF FOCUS

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

ROTARY SHOWCASE

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

RESPONDING TO CONFLICT

20,000 people

are maimed or killed by land mines each year.

TAKE ACTION

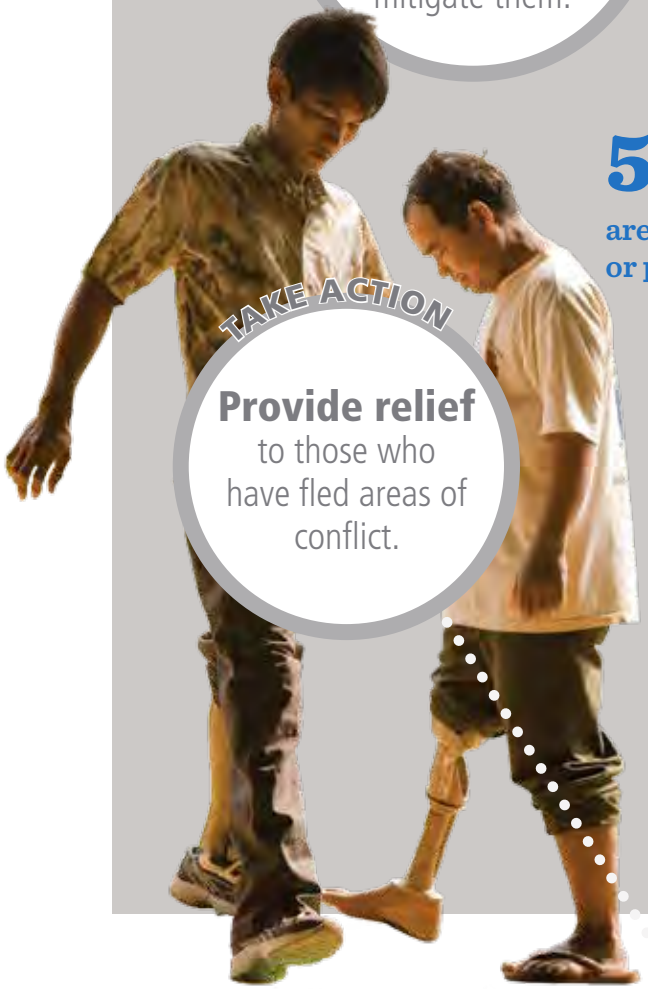
Identify triggering or accelerating factors in the conflict and work to mitigate them.

TAKE ACTION

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

51 million people

are currently displaced by armed conflict or persecution.



TAKE ACTION

Provide relief to those who have fled areas of conflict.

TAKE ACTION

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

TIPS FOR SUCCESS

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

90% of casualties

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

300,000 child soldiers

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

TIPS FOR SUCCESS

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

TAKE ACTION

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

TAKE ACTION

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

TAKE ACTION

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

TAKE ACTION

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

DISEASE PREVENTION

1 billion people

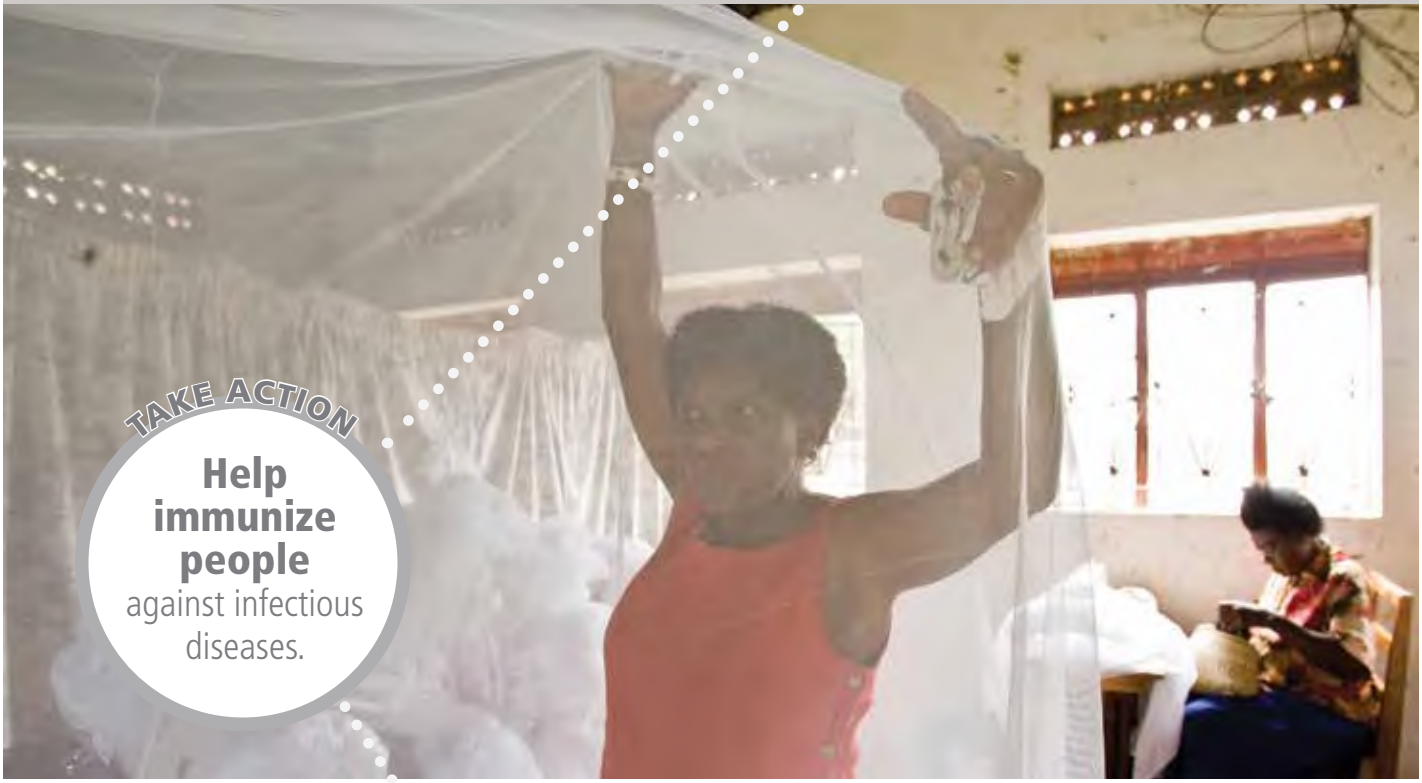
suffer from neglected tropical diseases such as dengue fever and leprosy each year.

TIPS FOR SUCCESS

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

TAKE ACTION

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



TAKE ACTION

Help immunize people against infectious diseases.

2.4 million doctors,

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

57 countries

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

TIPS FOR SUCCESS

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

TAKE ACTION

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

100 million people

are pushed into poverty each year by medical costs.

1 in 6 people

worldwide cannot pay for health care.

TIPS FOR SUCCESS

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

TAKE ACTION

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

SANITATION AND HYGIENE

2.5 billion people

lack access to improved sanitation.

TAKE ACTION

Improve sanitation facilities by providing toilets and latrines that flush into a sewer or safe enclosure.

TIPS FOR SUCCESS

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

1,400 children

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

TAKE ACTION

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

IMPROVE WATER QUALITY AND ACCESS TO WATER

TAKE ACTION

Build wells to extract groundwater from underground aquifers.

TIPS FOR SUCCESS

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

TAKE ACTION

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

6 hours

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

TAKE ACTION

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

TAKE ACTION

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

748 million people

don't have clean drinking water.

CHILD HEALTH CARE

TAKE ACTION

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

6.3 million children

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

TAKE ACTION

Promote good nutrition, including encouraging breastfeeding for most infants.

TAKE ACTION

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

TAKE ACTION

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

REPRODUCTIVE HEALTH

222 million women

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

TAKE ACTION

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

TIP FOR SUCCESS

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

ANTENATAL CARE AND CHILDBIRTH

TAKE ACTION

Provide birthing kits to health professionals.

Women in sub-Saharan Africa face a

1 in 39 lifetime risk

of dying of pregnancy- or childbirth-related complications.

80% of maternal deaths

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

TAKE ACTION

Support accredited training programs for health professionals.

TIPS FOR SUCCESS

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

TEACHER TRAINING

1.7 million additional teachers

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

TIPS FOR SUCCESS

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

TAKE ACTION

Provide teacher training and needed classroom supplies.

TAKE ACTION

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

TAKE ACTION

Volunteer in a classroom or after-school program.

57 million children

worldwide are not in school.

TAKE ACTION

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

TAKE ACTION

Develop an **adult literacy program**.

781 million people

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

TAKE ACTION

Serve as a mentor to students in your community.

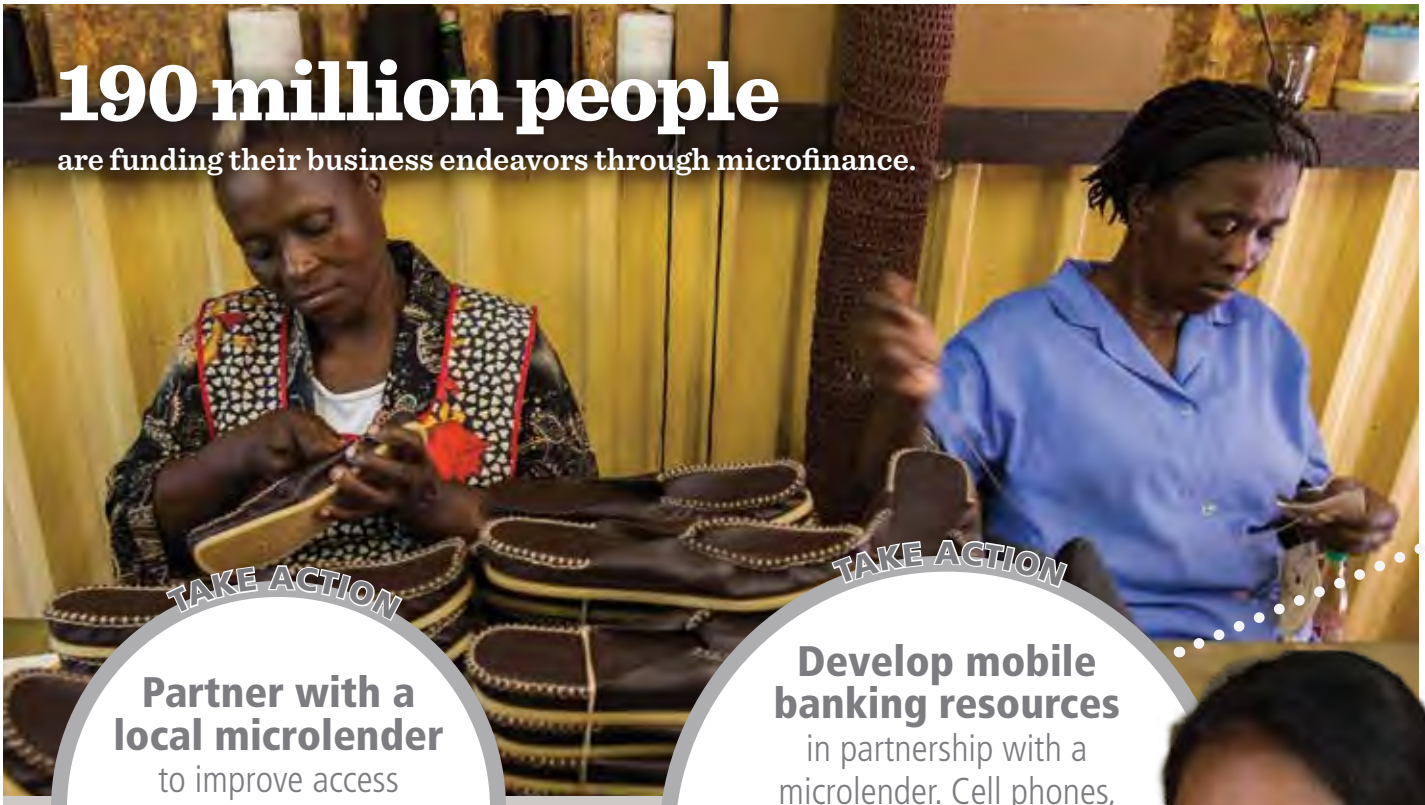
TAKE ACTION

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

TIPS FOR SUCCESS

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

INCOME GENERATION AND SAVINGS



190 million people
are funding their business endeavors through microfinance.

TAKE ACTION

Partner with a local microlender to improve access to financial services and provide financial infrastructure in the community.

TAKE ACTION

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

TIPS FOR SUCCESS

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

JOB CREATION AND ENTREPRENEURSHIP

1.4 billion people

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

TAKE ACTION

Expand vocational training opportunities, including job placement programming, at local nonprofit organizations.

TAKE ACTION

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

TIP FOR SUCCESS

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

TAKE ACTION

Provide equipment or supplies to a cooperative to increase production and sales in the local market.

TAKE ACTION

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

ADDITIONAL RESOURCES

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

Rotary

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

www.rotary.org

965-EN—(515)

Individual recognition

Rotary Foundation Sustaining Member

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

Benefactor

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

Paul Harris Fellow

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

Multiple Paul Harris Fellow

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

Paul Harris Society member

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

Bequest Society

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

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

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

Major Donor

When your cumulative donations reach $10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant. NOTE: Name recognition is not automatic and needs to be reported to RI staff. Recognition items commemorate giving at these levels:

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

Arch Klumph Society

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

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

Legacy Society

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

Club recognition

100% Paul Harris Fellow Club

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

100% Paul Harris Society Club

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

100% Foundation Giving Club

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

100% Rotary's Promise Club

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

Every Rotarian, Every Year Club

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

Top Three Per Capita in Annual Fund Giving

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

Notes

This concludes the four Friday sessions within your District.

Saturday morning you will go to your assigned breakout room.

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

You will be in that same room for the day.

SATURDAY SESSIONS

Session B-5 **Energizing My Rotary Club** (One hour)

	Step?	We want to accomplish?	How long?
1.	Welcome & Overview	Briefly introduce yourself and the room host (if any). Grouped by similar club sizes. Participants (and room host if any) will stay together throughout today. Provide overview for this first breakout session	2 min.
2.	Introductions Ice-Breaker	Getting participants engaged: Put participants into trios. If class total # is divisible by 3, then all trios, say 7 trios with 21. With 22, do 6 trios and two pairs. With 23, 7 trios and one pair. Just start at the front left of the U, and 1st 3 are trio, 2nd 3, etc. That way they are already next to each other and can move the middle chair back away from the table. Trios will introduce each other to the class. A interviews B, B interviews C, C interviews A. Besides name and club, get answers to these two questions: 1) What is your favorite time of day and why?, and 2) What is your key learning objective for today? Give them three minutes to interview. At 3 minutes, ask the trios to wrap up. When everyone is ready, ask who would like to go first? Ask the 1st trio to stand up and introduce each other. When they finish, lead the applause. Then ask for next? Chose from different parts of the U (avoid just going around the U in order). Continue until everyone has been introduced, then ask what did we discover from this process? Did it get noisy in the room? Why didn't the noise bother you? How did it feel to be introduced in the spotlight? Wrap up with: Good leaders put the spotlight on others rather than themselves.	24 min
3.	Tab B-5	Provide topic – have participants open Workbook to B-5 Energizing My Rotary Club	1 min
4.	1st Learning Objective	Understand the importance of connecting your club to RI vision and engaging the leadership team to explore flexibility options. Ask participants to open their notebook to the 8 PPT slides and club flexibility options. Facilitate class discussion: What resonates with you in slides 4 (RI Vision) and 5 (People of Action)? How can the areas of focus be used locally to attract more volunteers/members? Which of the flexibility options could energize your club?	12 min
5.	2nd Learning Objective	Identify club members of each respective club who would serve to form a strong club leadership team. Ask participants to open Leading Your Club (LYC) to pp. 9-10 Facilitate class discussion: What committee structure exists within your club? How can your club develop committee chairs?	8 min
6.	3rd Learning Objective	Explain the importance of a strong club leadership team. Facilitate classroom discussion: What steps can you take this year to build a strong leadership team? Where does your club need more leadership?	8 min
7.	Q & A	Ask for any questions and respond briefly	2 min
8.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	3 min

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 29, 2020

SESSION B-5 ENERGIZING MY ROTARY CLUB

GOAL
Club Presidents-elect will recognize RI strengths, club flexibility options, and the need to develop a strong club leadership team.

OBJECTIVES

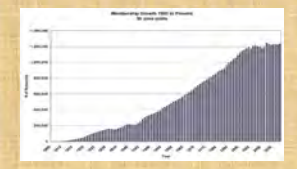
At the end of the session, Presidents-nominee will be able to:

1. Understand the importance of connecting the local club to RI vision and engaging the leadership team to explore flexibility options
2. Identify club members of each respective club who would serve to form a strong club leadership team
3. Explain the importance of a strong club leadership team

REFERENCE MATERIALS

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

Membership Growth Rate



1st 90 Years: 15% /yr

1996 - today: Flatlining

1

Innovation is the Key to Healthy Organizations

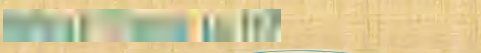
"You can change without improving, but you cannot improve without changing."

Pat Haggarty, former TI Leader

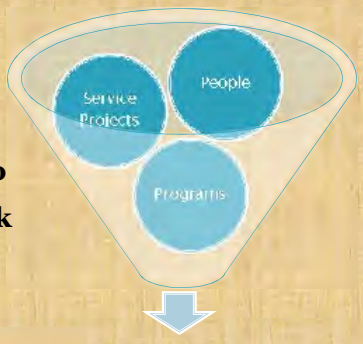
"This is a changing world; we must be prepared to change with it. The story of Rotary will have to be written again and again!"

Paul Harris – Founder of Rotary "This Rotarian Age", 1935

2



Time to Rethink Rotary



Engaging

3

Rotary Vision Statement:

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

4

RI Messages: Rotary.org

People of Action

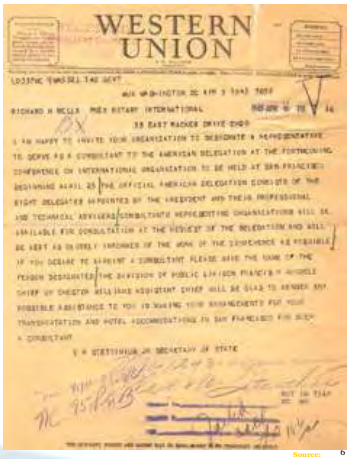
"Rotary is where neighbors, friends, and problem-solvers share ideas, join leaders, and take action to create lasting change".

- WE CONNECT PEOPLE
- WE TRANSFORM COMMUNITIES
- WE SOLVE PROBLEMS

5

1945

- **49 Rotarians help draft the United Nations Charter.**
- **Rotary International is granted adviser status at the UN Charter Conference.**


WESTERN UNION

6

Areas of Focus

Rotary is dedicated to six areas of focus to build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever.

Promoting Peace
Fighting Disease
Providing Clean Water, Sanitation & Hygiene
Saving Mothers and Children
Supporting Education
Growing Local Economies

7

Continuing to Learn

- Go to the Rotary E-Learning Center for resources you can explore independently.
- RI Catalog
- RI publications order form
- Shop online
- Rotary Basics , a thorough introduction to RI and Rotary Foundation programs and membership benefits and responsibilities.

8

Flexible options for clubs

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

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

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

Start a new type of club

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

Benefits:

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

Resources:

- Rotary club models (PDF)

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

Offer alternative membership types

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

Benefits:

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

Resources:

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

Change meeting format

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

Benefits:

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

- Members can gain professional development skills

Resources:

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

Relax attendance expectations / reduce meeting frequency

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

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

Benefits:

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

Resources:

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

Resources & reference

- Club Planning Assistant (interactive form)
- Practicing Flexibility and Innovation (online course)

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

Please help us improve. Was this page helpful?

YES NO

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Guiding principles

These principles have been developed over the years to provide Rotarians with a strong, common purpose and direction. They serve as a foundation for our relationships with each other and the action we take in the world.

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.

The Four-Way Test

The Four-Way Test is a nonpartisan and nonsectarian ethical guide for Rotarians to use for their personal and professional relationships. The test has been translated into more than 100 languages, and Rotarians recite it at club meetings:
Of the things we think, say or do

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?

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.
- 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

Session B-6 Increasing Humanitarian Service (One hour)

	Step?	We want to accomplish?	How Long?
1	Introduction and Start	Provide topic – have participants open PN Workbook to B-6 and LYC, Chapter 8	1 min
2	1st Learning Objective	Describe how service projects impact the retention of club members Divide participants into four groups (count off by 4) to get 5 or 6 people per group. Organize the groups around the U, 1's front left; 2's back left, 3's back right and 4's front right. Have them move chairs to create effective group Have groups share service project ideas for about 7 minutes. Then ask the groups to choose the idea that accomplishes the most impact. Then take 3 minutes to list the kinds of impact. Have each group share their lists with the class (3 minutes per group). Have them go to LYC and review President Elect responsibilities	20 min
3	2nd Learning Objective	Engage club members to reach out to local agencies or organizations to identify community needs Still in groups, have participants turn to Community Assessment Tools in PN Workbook. Have groups discuss the importance of undertaking a community needs assessment, as well as the types of methodologies of an assessment. Then ask groups to share reasons why community assessments are important, as well as examples of community assessment methodologies in their communities (have each group give one two-part answer). Next, have groups discuss the various types and characteristics of organizations and groups with which to partner in their communities. Then ask groups to share types and characteristics of partners in their communities (again have each group give one two-part answer). As time allows, ask for additional sharing on community assessments and methodologies and partners and characteristics.	17 min
4	3rd Learning Objective	Explain ways to evaluate a service project to determine whether to continue a project Refer participants to Service Project Evaluation Survey in PN Workbook Still in groups, have groups discuss the warning signs of a project that needs to be re-evaluated and the reasons to discontinue a project (7 minutes) Ask each group to provide a brief summary of their discussion(2minutes per group)	15 min
5	Q & A	Ask for any questions and respond briefly	3 min
6	Wrap up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	4 min

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 29, 2020

SESSION B-6 INCREASING HUMANITARIAN SERVICE

GOAL
Club Presidents-elect will have the skills necessary to evaluate service projects and the involvement of club members.

OBJECTIVES

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

1. Describe how service projects impact the retention of club members
2. Engage club members to reach out to local agencies or organizations to identify community needs
3. Explain ways to evaluate a service project to determine whether to continue the project

REFERENCE MATERIALS

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

COMMUNITY ASSESSMENT TOOLS

A resource for Rotary projects

Rotary

Contents

Introduction 2

Types of assessments

- Community meeting 5
- Asset inventory 8
- Survey 10
- Interview 13
- Focus group 15
- Community mapping 18

Recommended stakeholders for Rotary's areas of focus 20

Introduction

Assessing your community's strengths, weaknesses, needs, and assets is an essential first step in planning an effective project. By taking the time to learn about your community, you can discover the best opportunities for service and maximize your club's ability to make an impact.

An assessment not only helps you better understand the dynamics of your community but also allows you and your project's beneficiaries to make informed decisions about service priorities. Even if you're actively involved in your community, an assessment can reveal additional strengths and opportunities for growth. Perhaps you'll find a new way to address a known issue, or give residents a chance to point out overlooked challenges. Before you start an assessment, consider what you want to learn about your community. An effective assessment will reveal things you did not know before.

Assessments are the foundation of every humanitarian project, small or large, because they provide a framework for identifying solutions to a community's problems. They also build valuable relationships and encourage residents to help make lasting local improvements. Developing trust in communities can take time — months, even years. Conducting an assessment is critical to creating that trust, and to fostering community ownership and sustainability.

Conversations with just one or two people aren't enough to reveal a community's needs. Assessments should be systematic, involve a variety of local stakeholders and beneficiaries, and engage them in a meaningful way.

While conducting an assessment, also be sure to manage expectations. Communities should understand the benefits of partnering with Rotary and how that partnership requires their involvement, contribution, and ownership.

NOT SURE WHERE TO START?

One way to ensure community ownership is to encourage local volunteers to form a Rotary Community Corps. An RCC is a team of men and women who aren't Rotarians but who work in partnership with Rotary clubs to improve their communities. Sponsoring an RCC is a great way to welcome community members as true partners in service. Learn more at **my.rotary.org/rcc**.

Types of assessments

You can combine or adapt the following six assessments to best suit your club's resources and the preferences of community members:

- Community meeting
- Asset inventory
- Survey
- Interview
- Focus group
- Community mapping

As you determine your approach, consider any available data about the community. Has the local, regional, or national government recently published credible findings that could inform your strategy? Have other organizations or institutions researched the community? Do you notice any gaps in official statistical data that need to be addressed through formal preliminary research? To answer these questions, consider partnering with local experts in your club or district.

TIPS FOR CONDUCTING ANY ASSESSMENT

- ☐ **Remain open minded.** Do not underestimate the community. Don't presume you know what it needs or what challenges it faces.
- ☐ **Choose participants carefully.** Consider the makeup of the community and ensure you include a diverse cross-section of relevant groups (e.g., gender, age, ethnicity, religion, income level, vocation).
- ☐ **Include overlooked or marginalized groups.** Women, young people, the elderly, and religious and ethnic minorities are often overlooked. Keep the community's social dynamics in mind, and provide a forum in which all groups feel comfortable sharing their views.
- ☐ **Consider yourself an outsider.** Even if you live in the community you want to work with, find a well-connected individual, group, or organization that can introduce you to local stakeholders.
- ☐ **Avoid promising a project before your club makes a formal decision.** But do assure participants that you'll let them know what your club decides. Invite them to take part in any future activities.
- ☐ **Empower stakeholders.** Speak with them, not at them, and encourage them to help inform decisions. Ensure stakeholders are an active part of any local initiative.

ARE YOU APPLYING FOR A GLOBAL GRANT? IF SO, YOUR COMMUNITY ASSESSMENT MUST:

- ☐ Include at least two involved stakeholder groups that represent the community fairly
- ☐ Use a formal methodology
- ☐ Assess more than infrastructure
- ☐ Describe the current situation in the community, including assets and needs
- ☐ Explain the connection between the project and community assessment

The **Global Grants Community Assessment Results** form may be included with your application. Find tips for strengthening your project in **A Guide to Global Grants**.

To develop a strong project from the start, ask your **district international service chair** to connect you with regional experts who have experience in project planning (from community assessments to measurements and evaluations), along with technical expertise in Rotary's six areas of focus and Rotary grants. International service chairs can introduce you to Rotarians, Rotary alumni, community members, and professionals from other organizations who are eager to support club projects or grants. They are also outstanding resources for finding international partners, as well as publications and online tools that could help improve your project.

COMMUNITY ASSESSMENTS IN ACTION

"When you go into a developing community, the people there will take whatever help you want to bring. They're not going to say no to a project. But that doesn't mean that my idea of their greatest need is the same as theirs." — Mike Wittry, President, Rotary Club of Roatan, Islas de la Bahía, Honduras

After completing playground projects in Belize, District 5370 — which includes Edmonton, Alberta, Canada — decided to expand its efforts to Honduras. The Rotary Club of Roatan helped encourage local communities to apply for one of two playgrounds.

The village of St. Helene, a 45-minute boat ride from Roatan, had poor sanitation, a weak economy, and widespread health issues. It lacked water and electricity, and its school had no books or classroom materials. But the people there wanted a playground, and they had a piece of land to donate.

The Canadian Rotarians spent about two weeks building the playground in St. Helene. The work was just beginning, though: They asked their local Rotary partners to conduct a community assessment that would help them learn about the villagers' priorities.

Mike Wittry, then president of the Roatan club, and his fellow club members started with a community meeting. Although many people attended, the village council did most of the talking. The others — moms and dads, local elders — sat in the back and nodded. Then the club held smaller focus groups that did not involve the community leaders. Some people shared the same concerns as the village council, but they also raised other issues. They were open about their struggles and the lack of opportunity for themselves and their children.

The club also organized a community mapping activity to help understand residents' different perspectives. Participants drew a map of their village and highlighted the places that were most important to them. The school was important to people with children, and the clinic was important to almost everyone. This exercise helped villagers talk about what they had and didn't have, and prioritize their needs. It also shaped future service efforts: Now Rotarians are taking a holistic approach in St. Helene through a series of water and sanitation projects.

Community meeting

A community meeting, sometimes called a town hall or public forum, is either a formal or informal public gathering that brings together local residents to discuss issues, voice concerns, and express preferences for community priorities.

In these meetings, a facilitator leads discussions on issues related to the community's strengths and potential challenges and encourages attendees to participate. The facilitator also directs any questions to subject matter experts.

Consider appointing a respected community member or a representative from a local organization to facilitate the meeting, particularly if cultural or language barriers are an issue.

Before organizing a meeting, define your objectives and provide training for your facilitator. Knowing what you hope to achieve will help you plan and host a successful meeting.

Advantages of community meetings include:

- Give people of diverse backgrounds a chance to express their views
- Allow participants to build upon one another's responses
- Can involve a fairly large group of people at one time
- Can help identify respected community leaders to involve in a project
- Can help discern the significance of a variety of issues
- Can help explore potential solutions

Challenges with community meetings may include:

- Can be difficult to maintain an open, comfortable, relaxed environment
- Can be difficult to keep the conversation on topic
- May be influenced by social constraints including gender disparities, power dynamics, cultural norms, etc.
- May be dominated by one or two vocal participants to the exclusion of others

TIPS FOR HOSTING A COMMUNITY MEETING

- ☐ **Identify your goals.** What insight do you hope to gain from this meeting? Are there specific issues in the community that you want to better understand? Design questions that will provoke constructive answers.

- ☐ **Select an accessible location and convenient time.** Host the discussion at a venue that is easy to find and easy to access. Consider the participants' schedules when determining a time.

- ☐ **Promote the event throughout the community.** Be mindful of cultural values and norms that may affect responses (for example, in some communities, women may not feel empowered to talk openly and honestly in the presence of men). Factor in the level of literacy in the community and how residents normally receive information (e.g., flyers, radio, announcements at schools or houses of worship).

- ☐ **Prepare a list of questions.** Keep your questions simple and concise. If you hear new concerns or the same issues being raised by participants, follow up on their responses with more questions.

- ☐ **Set and follow a schedule.** Decide how much time to spend on each question, factoring in follow-up questions based on issues and ideas identified during the discussion.

- ☐ **Set and state ground rules.** Share ground rules with participants before the meeting to prevent people from monopolizing the forum, to help engage every member in the discussion, and to keep the conversation on track.

- ☐ **Take notes.** Write down ideas, making sure everyone can see the notes during the discussion. Enlist one or two other people to help you keep track of the conversation.

- ☐ **Be an active listener.** Let all participants know that you're engaged and interested in what they have to say. Be considerate of their time.

- ☐ **Ask participants to elaborate.** Ask follow-up questions if you don't understand their feedback.

- ☐ **Allow for small group discussions.** Small groups provide more speaking opportunities for attendees. Ask each group to record its notes, and have a designated group member briefly summarize its discussion for the larger audience. To help make people feel comfortable participating, consider creating groups composed entirely of community members who might be less likely to speak out (e.g., a group of all women, young people, people with disabilities, ethnic minorities, etc.).

ADDRESSING CHALLENGES IN COMMUNITY MEETINGS

- If certain participants are dominating the conversation, make a point of asking others for their ideas.
- Watch body language and make adjustments as necessary. Maybe the facilitator needs a break, or you need to stop someone from speaking too much. A quick five-minute break can help refocus the discussion.
- Use encouraging body language and tone of voice, as well as words. For instance, lean forward when people are talking, keep your body position open and approachable, and be attentive to everyone, not just those who are most articulate.
- Pay attention to group dynamics. Be aware of emotional reactions participants may have to others' comments, particularly if they appear to be upset, hurt, angry, or defensive. A trained facilitator should encourage participants to follow ground rules and express themselves without making personal accusations or embarrassing others. If participants seem puzzled or confused, revisit the comments or points that caused the confusion or try to restate them more clearly.
- Keep the meeting on topic. If you need to refocus the discussion, summarize the points that have been made and ask if anyone has additional thoughts about the original question.

FOLLOWING UP AFTER A COMMUNITY MEETING

- Thank participants for attending and sharing their feedback.
- Summarize key findings and outline any action plans moving forward.
- If a project is identified, consider inviting key stakeholders to assist with the initiative.

Asset inventory

An asset inventory identifies the types of resources in a community, including its physical environment, institutions, services, events — and especially its people. To conduct the inventory, participants highlight the individuals, places, and things they find valuable and then document and analyze their findings. The results can help a community explore how its assets are connected and how it can use them to create positive change.

Advantages to using asset inventories include:

- Maximize available resources
- Encourage the creation of broad, inclusive networks to effect change
- Help identify areas of community member interest
- Can be maintained, expanded, and used repeatedly

Challenges with asset inventories may include:

- Data analysis can be time consuming.
- Organizing assets and identifying connections can be difficult.
- Interests, skills, and other nonphysical assets can be easily overlooked.

TIPS FOR CONDUCTING AN ASSET INVENTORY

- ☐ Determine what you want to inventory, and identify potential participants.
- ☐ Invite a small, diverse group of community members to conduct the inventory in one or more sessions.
- ☐ Use strong group facilitators to ensure that all participants have an opportunity to contribute and that each discussion group stays on task and on time.
- ☐ Analyze the results. Organize assets by category and document connections among them.
- ☐ Use available assets to create coalitions and networks to address community issues.
- ☐ Update and maintain the inventory regularly.

SUGGESTED INVENTORY QUESTIONS

- What is special about your community?
- What products are made in your community?
- What events take place in your community?
- When and where do people gather, and what do they do together? Include religious, social service, sporting, entertainment, and other types of gatherings.
- Who do you know? What skills do they have? What do they own? What knowledge might they share with others?
- Is there an enterprising spirit in your community, either in business or civic/cultural activities?
- What topics or issues interest a significant number of community members?
- What institutions exist in the community, both private and public?
- Who are the formal and informal leaders of the community? Who do people listen to?
- How does information spread in your community?
- What services are provided in your community? Who provides them?
- What natural resources are found in your community? Which areas have open space?
- What skills or knowledge in your community should be passed down to the next generation?
- What businesses exist in your community?
- What volunteer activities exist in your community, both formal and informal?
- How do community members demonstrate that they care for and trust their neighbors?
- What utilities and services are available in the community or institution? What payment or financing systems are in place to pay for goods and services?
- Does a governing body help manage services, create and enforce rules, and perform other critical functions?

VARIATIONS

- ☐ Divide participants into groups by gender, age, or profession to reveal how different groups view the community.
- ☐ Instead of a broad-based inventory, choose a specific community issue such as education or health and create an inventory of only those assets.
- ☐ Incorporate a walk or drive around the community to encourage an expansive approach to identifying assets.

Survey

Surveys are a popular method of collecting information and opinions. In the context of a community assessment, a survey can reveal the community's perceived strengths, assets, weaknesses, and needs. Surveys can be general or targeted to specific groups. Try to reach as many people as you can, focusing on key stakeholders in the community. You can administer surveys through email, by phone, or in person.

Advantages to using surveys include:

- They can be administered remotely.
- They can be repeated.
- They can be completed anonymously, encouraging candid responses.
- They're generally inexpensive to administer.

Challenges with surveys may include:

- Identifying prospective respondents and obtaining their personal contact information can be difficult.
- Emailed surveys are ineffective in places where internet access is limited.
- Phone surveys may be subject to sample or interviewer bias.
- Response rates for remote surveys are generally low compared with in-person assessments.
- Written surveys are ineffective with illiterate populations.
- Written surveys don't allow for follow-up questions.

Types of survey questions

☐ **Multiple choice questions.** Respondents select one or more options from a list. Multiple choice questions work best when you have a fixed number of options.

Example:
What do you feel are the most pressing needs in your community (select two):

- ○ *Health care*
- ○ *Quality of education*
- ○ *Employment opportunities*
- ○ *Public safety*
- ○ *Other (please describe):* _____

☐ **Rating scales.** Respondents rate their opinion of a statement or set of statements using a range of feelings or attitudes. To avoid confusion, try to frame all statements positively rather than negatively. For instance, use "The number of teachers is sufficient" rather than "The number of teachers is not sufficient."

Example:
Please respond to each statement about your school:

	1 Strongly Disagree	2 Somewhat Disagree	3 Neither Agree or Disagree	4 Somewhat Agree	5 Strongly Agree
The number of teachers is sufficient.					
Our teachers are well-qualified.					
Our school provides a safe environment for our children.					
Our classrooms are well-equipped.					
I am familiar with my child's curriculum.					
I regularly help my child with homework.					
Our school provides nutritious meals.					

☐ **Open-ended questions.** Respondents answer questions in their own words. This format can elicit more nuanced responses, but survey results aren't as easily quantifiable and must be individually analyzed.

Example:
If you could improve one aspect of your community, what would it be and why?

_____

_____

☐ **Demographic questions.** Demographic information (e.g., gender, education, income level) can add context to responses that will reveal trends within a larger population.

Example:
What is your age?

- ○ *18-24*
- ○ *25-34*
- ○ *35-44*
- ○ *45-54*
- ○ *55-64*
- ○ *65+*

TIPS FOR DESIGNING A GOOD SURVEY

- ☐ **Explain why you're asking the questions.** Participants are more likely to respond if they feel there will be a valuable outcome, such as the possibility of a future project.

- ☐ **Keep it short and simple.** If your survey is too long, respondents may rush their responses or even drop out of the survey before completing it. Make sure your questions are brief and specific.

- ☐ **Make sure your questions are unbiased.** Avoid leading questions such as "Would you like to see a new library in the vacant lot instead of a playground?" in favor of more neutral wording: "What would you like to see developed in the vacant lot? a) library b) playground c) other (please describe)."

- ☐ **Conduct a small pilot of the survey.** Testing your survey can reveal whether your questions are clear and specific.

Interview

Interviews are one-on-one conversations between a facilitator (the interviewer) and a community stakeholder (the respondent). Interviews allow you to gain a deeper understanding of the respondent's ideas and feelings. Unlike surveys, interviews give the facilitator the freedom to veer off script and ask follow-up questions. And unlike group assessments, such as community discussions and focus groups, the respondent has the facilitator's sole attention and is more likely to share personal opinions freely.

Advantages to using interviews include:

- They allow the facilitator to follow the flow of conversation and ask spontaneous questions.
- They encourage the respondent to speak freely and give spontaneous answers.
- They're the most accurate and thorough way to obtain qualitative data from your respondents.
- They're effective with illiterate populations.

Challenges with interviews may include:

- They're time consuming.
- They reach only one respondent at a time.
- Conducting a good interview requires practice and some degree of skill.
- Finding willing respondents for impromptu interviews can be difficult. (It's better to schedule phone interviews in advance.)

TIPS FOR DESIGNING AND CONDUCTING A GOOD INTERVIEW

- ☐ **Identify your goals.** What insight do you hope to gain from this interview? Are there specific issues in the community you want to better understand? Design questions that will provoke constructive answers.

- ☐ **Identify your target respondents.** Whose opinions are you interested in understanding? Will you identify specific individuals to invite to appointments, or will you seek out random participants in a public place?

- ☐ **Prepare your interview questions.** Keep your questions as simple and concise as possible. If you have complex questions, ask them toward the end of the interview. If you have sensitive questions, be sure to conduct your interview in a private place. Keep your choice of words at a basic level.

- ☐ **Practice.** Conduct some mock interviews with your colleagues and solicit their feedback.

- ☐ **Establish rapport.** Make your respondent feel comfortable before you start asking questions.

- ☐ **Conduct your interview like a real conversation.** It's best to have your questions committed to memory so you can ask them naturally, changing the order and adding impromptu follow-up questions as needed.

- ☐ **Take accurate notes.** If you're recording audio of your conversation, get the respondent's consent beforehand.

- ☐ **Be an active listener.** Show your respondent that you're engaged and interested. Be considerate of the person's time. After all, this may be the first conversation in a long and productive service partnership.

- ☐ **Ask respondents to elaborate.** Simple yes/no answers won't yield much useful information. Probe further with follow-up questions and ask respondents to clarify if you don't understand. You may want to prepare specific prompts for drawing out additional information. For example:
  Question: *How easy is it to get health care in your community?*
  Prompts:
  - ○ *Is it easy to get to a hospital in your community? Is it easy to get medical treatment at the hospital?*
  - ○ *Do you visit the hospital for check-ups, or only for emergencies?*
  - ○ *In your experience, is medical care affordable? Do you need to have insurance?*
  - ○ *What happens to uninsured people? Where do they go?*
  - ○ *Have you or anyone you know gone without medical treatment due to the cost?*

- ☐ **Offer to follow up with respondents.** Ask your respondents if they'd like to be contacted about future assessments or community improvement activities. Be sure to follow through on these commitments.

Focus group

A focus group is a carefully guided discussion used to determine a target group's opinions on a particular idea. It can help you determine how the stakeholders believe community issues should be addressed.

Conducting a focus group requires careful planning and a skilled discussion facilitator. Most focus groups consist of six to 12 diverse stakeholders. Participants are asked a series of carefully worded, open-ended questions on different issues in the community. This approach promotes self-disclosure.

In a group setting, dialogue tends to evolve and participants build on each other's responses. An effective focus group will seem more like a collaborative discussion than a debate. It's most effective to conduct a focus group in a private, comfortable setting, with one facilitator and someone to record participant responses.

Although you will need to hear from a diverse group of participants, keep cultural beliefs and community structures in mind. In some communities, women may not feel comfortable expressing their opinions in front of male facilitators or other men. Similarly, young people may not feel comfortable expressing their opinions in front of adults. You may need to host a number of focus groups with different participants based on occupation, age, gender, family structure, or other factors.

Advantages to using focus groups include:

- They're quick and easy to set up.
- Group dynamics can provide useful information that individual data collection doesn't.
- They're useful for gaining insight into a topic that's not easily quantifiable.
- They're effective with illiterate populations.

Challenges with focus groups may include:

- Facilitators are susceptible to bias.
- Discussions can be dominated or sidetracked by a few individuals.
- Analyzing data can be time consuming.
- They provide information about the group, not individual participants. The participants may not represent the whole community, so additional focus groups may be necessary.

PREPARING QUESTIONS

Develop a list of concepts you wish to discuss. These could include issues your club thinks might exist in the community, ideas for projects, or people's perceptions of community resources. Make sure your questions will help guide the discussion and encourage participants to share their ideas. Here are some common types of focus group questions:

- **Opening questions** get participants talking and feeling comfortable. They should be easy to answer.
  - *How long have you worked at the school?*
  - *What do you teach/which position do you hold?*

- **Introductory questions** get the group thinking about the topic and focus the conversation.
  - *If you could change three things at the school, what would you change and why?*

- **Transition questions** prepare participants for the in-depth conversation.
  - *Why do you think 50 percent of girls stop attending the school after their second year?*

- **Key questions** focus on major areas of concern and guide the majority of the discussion.
  - *What resources and training does the school need to encourage girls to return after their second year?*
  - *What resources and training do families need to send their daughters back to school after their second year?*

- **Closing questions** wrap up the discussion and allow participants to voice any final thoughts.
  - *Do you know any parents who would be interested in sharing why they didn't send their daughters to school after the second year?*
  - *Do you know any parents who want their daughter to return to school but are unable to send her?*

TIPS FOR CONDUCTING A FOCUS GROUP

- ☐ Select a location that's convenient, private, and comfortable for a small group discussion, and choose a time when participants can attend.
- ☐ If your facilitator is a community member, provide training beforehand.
- ☐ Arrange for another facilitator to record the focus group session or take notes on the group's responses, making sure participants can see them. Periodically ask the group if the notes are accurate.
- ☐ Invite Rotary Community Corps members to participate in focus group activities.
- ☐ Invite six to 12 participants, an ideal size for a focus group. Make sure they're representative of the community and are willing to provide feedback.
- ☐ Explain the purpose of the focus group, and state your goals openly. Establish simple ground rules to promote positive interaction and confidence in the process.
- ☐ Introduce the main topic, and guide the discussion using your prepared questions. Establish a schedule beforehand, such as 10-15 minutes per question.
- ☐ Allow each person time to answer. Listen carefully to the ideas expressed and ask for clarification if needed, but avoid confrontations or debates.
- ☐ Allow participants to respond to comments. Make sure the discussion and comments stay on topic.

FOLLOWING UP WITH PARTICIPANTS

After completing the focus group, thank participants for their time and input. Consider how you'll follow up with them and maintain relationships. Share your conclusions with participants and, if appropriate, invite them to be involved in the project.

VARIATIONS

- ☐ Hold separate focus groups on the same issue, one with members of your club and another with representatives from the community. Are the responses the same or different? Were any concerns or factors mentioned that you had not previously considered?
- ☐ Separate groups according to subgroup characteristics, such as gender, age, education or literacy, disability, ethnicity, etc.

Community mapping

Community mapping can reveal different perspectives about a community. It requires few resources and little time and can be adapted for participants of virtually any age or educational background.

In this facilitated activity, individuals or groups draw a map of their community, marking certain points of importance and noting how often they visit these places. A facilitator leads a discussion about the maps, while another facilitator records the discussion. A successful community mapping exercise will get participants to:

- Identify how they use community resources and any barriers to accessing them
- Compare perceptions of the importance of various community resources
- Generate ideas for community improvement

Advantages of community mapping include:

- It's a lively and engaging activity.
- It encourages participants to discuss how they might improve their community.
- It can be broken up into multiple sessions with different community stakeholder groups.

Challenges with community mapping may include:

- Analyzing results can be a difficult process, because the information is gathered in a visual format.
- Drawing conclusions from the maps and determining next steps may require additional assessment activities.

TIPS FOR COMMUNITY MAPPING

- ☐ Keep groups small — ideally no more than 20 participants, divided into subgroups of four to six.
- ☐ Help each subgroup draw a map based on its own perceptions of the community. The variety of maps will yield a wealth of information.
- ☐ In the large group, discuss all the maps:
  - What are the differences between the maps?
  - Why might the differences be important?
  - What are the similarities between the maps?
  - What important aspects of the community are implied by the similarities?
  - What are some suggested additions to the community? How would these places improve the community?
  - Do the maps indicate any specific activities or projects that might improve the community?
- ☐ Ask participants to volunteer to join a committee to further analyze the maps and identify next steps.

WHAT TO MAP

- Places of residence
- Places of importance to participants, such as markets, religious centers, schools, community centers, parks, businesses, fields, water sources, government offices, health clinics, police stations, and recreational areas
- Places used for defecation, especially in relation to institutions, areas where people congregate, and water sources
- Places where participants spend the most time, using different colors to indicate daily, weekly, monthly, or yearly visits
- Places where they enjoy and don't enjoy spending time, indicated by different colors
- Places they'd like to add to the community, indicated by sticky notes or small squares of paper

VARIATIONS

- ☐ Separate participants into small groups by gender, age, ethnicity, profession, etc., to encourage diversity among the maps.
- ☐ Have groups tour the community before drawing their maps.
- ☐ Ask participants to identify a central place in the community to help orient everyone's maps.

RECOMMENDED STAKEHOLDERS FOR ROTARY'S AREAS OF FOCUS

Peace and conflict prevention/ resolution

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

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

Water and sanitation

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

Basic education and literacy

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

Disease prevention and treatment & maternal and child health

- Individual health care recipients:
  - Pregnant women
  - At-risk children
  - Adults at risk for noncommunicable and communicable diseases
  - At-risk aging population
- Community health centers and hospitals
- Mobile outreach systems
- Community health care workers
- Skilled birth attendants
- Health care professionals (nurses, doctors, midwives, technicians, specialists, etc.)
- Access and continuum of care structures:
  - Prevention, primary care, and referral systems
  - Transportation providers
  - Hospitals
  - Follow-up and rehabilitation services
  - Chronic care support and palliative/hospice care systems

Economic and community development

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

Service Project Evaluation Survey

Please tell us about your volunteer experience today. You helped to create positive change in our community, and we want to hear about it. We will process this information and share the results of your team's hard work. Please complete this survey before you leave the project site and turn it in to your Volunteer Leader.

Rate the following statements on a scale of 1-5, where 1=Strongly Disagree and 5=Strongly Agree.

Scale

1 Strongly Disagree 2 Disagree 3 Neutral 4 Agree 5 Strongly Agree

1. The project we completed made a positive impact on the community.

1 2 3 4 5

2. Participating in this project was a good way to meet and network with people in my community.

1 2 3 4 5

3. I feel a stronger connection to my community after participating in this project.

1 2 3 4 5

4. I have a greater sense of pride in my community after participating in this project.

1 2 3 4 5

5. I felt a sense of accomplishment at the end of the project.

1 2 3 4 5

6. The project was well organized.

1 2 3 4 5

7. This project motivated me to continue to volunteer.

1 2 3 4 5

8. I would like to lead a project in the future.

1 2 3 4 5

Service Project Evaluation Survey

Share a memorable moment from the project (use the back of this sheet, if necessary):

How could we have improved this volunteer experience for you?

If you would like to share any other feedback, please list below.

Thank you!

Notes

Session B-7 **Promoting Rotary** (30 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduction & Start	Provide topic – have participants open PN Workbook to B-7 and LYC, Chapter 6.	2 min.
2.	1st Learning Objective	Identify ways that each respective club is impacting their community Facilitate classroom discussion: What is your club doing to impact your local community? What are the different kinds of impact?	6 min
3.	2nd Learning Objective	Share methods for getting the story out in the club and local community about the good each Rotary club is doing Have participants turn to p. 45 of LYC and review President-elect responsibilities Facilitate classroom discussion: What are the needed elements to create a positive public image within your community? What steps could you as PE take to enhance public perception of your club? How can new members directly impact the club's public image? Refer to p. 46 of LYC and ask about engagement through social media	8 min
4.	3rd Learning Objective	List resources that can be employed to promote Rotary Facilitate classroom discussion: What are the resources that can be used to promote Rotary? Have them turn to p. 47 of LYC for messages, and the handout, Key Points For Talking About Rotary.	8 min
5.	Q & A	Ask for any questions and respond briefly	3 min
6.	Wrap up and evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator. Proceed with transition to lunch. Tell them that the first afternoon breakout starts at 1:30 pm and that you will be facilitating that session as well. Course materials may be left in the room. Take valuables (laptops/tablets etc.) with them.	3 min

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 29, 2020

SESSION B-7 PROMOTING ROTARY

GOAL
Club Presidents-elect will be able to provide leadership in reviewing and planning activities to enhance public and club awareness of Rotary's impact.

OBJECTIVES

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

1. Identify ways that each respective club is impacting their community
2. Share methods for getting the story out in the club and local community about the good each Rotary club is doing
3. List resources that can be employed to promote Rotary

REFERENCE MATERIALS

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

KEY POINTS FOR TALKING ABOUT ROTARY

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

INTRODUCTORY PRIMARY MESSAGE

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

SUPPORTING MESSAGE

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

ABOUT ROTARY — PRIMARY MESSAGES

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

SUPPORTING MESSAGES

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

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

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

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

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

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

ROTARY AT A GLANCE

Solving real problems takes real commitment and vision. **Rotary** unites people from all continents and cultures who take action to deliver real, long-term solutions to our world's most persistent issues. Together, we apply our professional experience and personal commitment to find new and effective ways to enhance health, stability, and prosperity across the globe.

Through volunteering, our 1.2 million members make lifelong friendships that transcend political and cultural boundaries and foster global understanding and respect. In addition to our 35,000 clubs, Rotary also offers expanded service opportunities including:

Interact: a service organization organized and sponsored by Rotary clubs for young adults ages 12-18. There are more than 20,300 Interact clubs in 159 countries.

Rotaract: groups organized by Rotary clubs to promote leadership, professional development, and service among young adults ages 18-30. There are more than 10,000 Rotaract clubs in 184 countries.

Rotary Community Corps (RCCs): groups of non-Rotary members who work to improve their communities. There are more than 7,500 RCCs in 80 countries, all organized and sponsored by Rotary clubs.

Membership Snapshot

Who: Rotary brings together the kind of people who step forward to take on important issues for local communities worldwide. Rotary members hail from a range of professional backgrounds; doctors, artists, small business owners, teachers and executives all call themselves Rotarians. Rotary connects these unique perspectives, and helps leverage its members' expertise to improve lives everywhere.

Where: From Haiti and Greenland to Nigeria and Singapore, Rotary unites a truly diverse set of leaders from across the world. Currently, the largest number of clubs comes from the United States, India, Japan and Brazil. The fastest growing Rotary regions include Southeast Asia and Africa.

What: Each year, Rotary members invest more than $200 million and 16 million volunteer hours to promote peace, fight disease, provide clean water, save mothers and children, support education, and grow local economies.

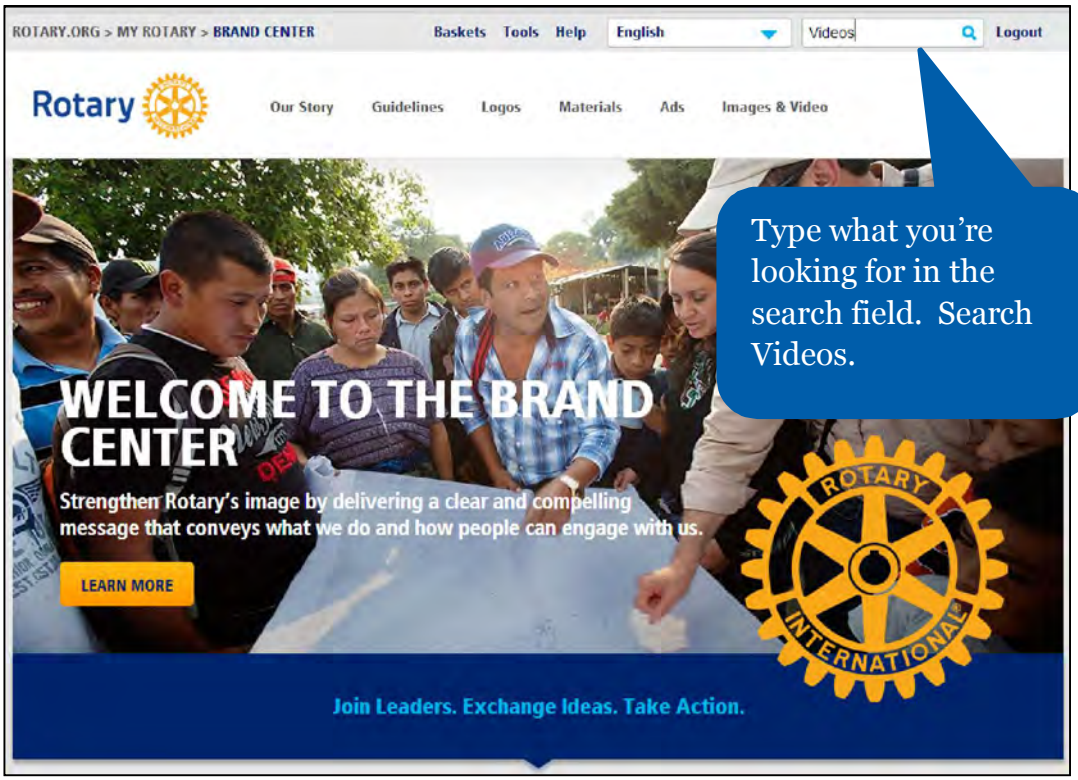
Polio Eradication

For more than 30 years, Rotary has been the driving force in the effort to eradicate polio worldwide. Alongside our partners in the Global Polio Eradication Initiative, we have achieved a 99.9 percent reduction in polio cases. Our members have contributed $1.9 billion and countless volunteer hours to protect more than 2.5 billion children in 122 countries from this paralyzing disease. Today, polio remains endemic in Afghanistan, Nigeria, and Pakistan. Rotary remains committed to ending polio, and will raise $50 million per year, with every dollar to be matched with two additional dollars through a matching agreement with the Bill & Melinda Gates Foundation. With the infrastructure we helped create to end polio, we have built a lasting global health legacy that is now used to reach millions of children to treat and prevent other diseases.

SEARCH THE BRAND CENTER

rotary.org/brandcenter

1



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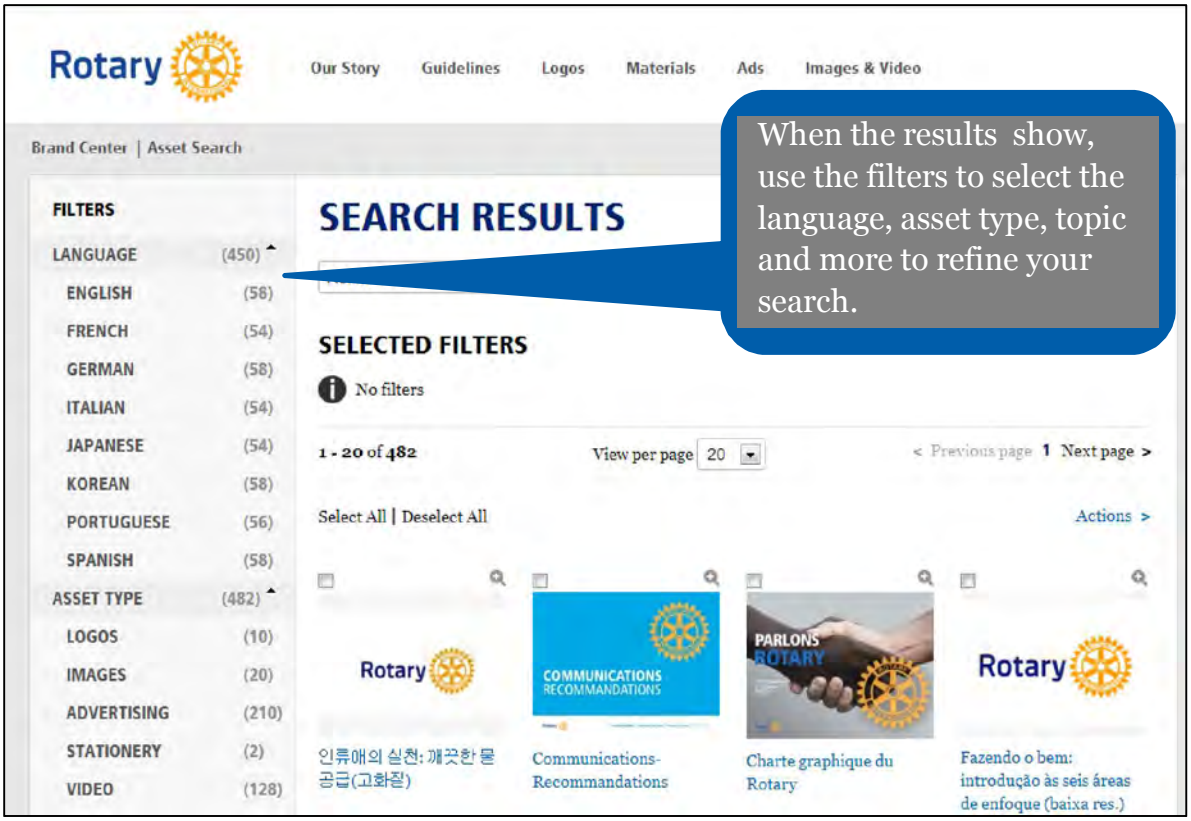


Overview

A consistent voice and visual identity are essential components of a strong brand. By using the People of Action messaging and design elements in this guide you help build awareness and understanding of Rotary and its impact in the community. Use the guide when producing print or digital content or merchandise. You can find more information in the Voice and Visual Identity Guidelines available on the Brand Center at **rotary.org/brandcenter**.

Logos

The Masterbrand Signature is our official logo and combines the wheel with the word "Rotary" (Rotary's wordmark) to the left for visibility and recognition.

Our logo can't be altered in any way. The wheel and the wordmark must always appear together. Because the word "Rotary" is a wordmark and not a font, it can't be replaced with a font. Only the colors shown on this page may be used in the logo.

Both the Masterbrand Signature and the Masterbrand Signature Simplified can be used on all print and digital applications. We recommend using the simplified version if the logo will be smaller than 1.25 cm (0.5 inches) or will be embroidered.

Clear space is the space surrounding the Masterbrand Signature that needs to remain empty. It is equal to the height of the capital "R" in the Rotary wordmark.

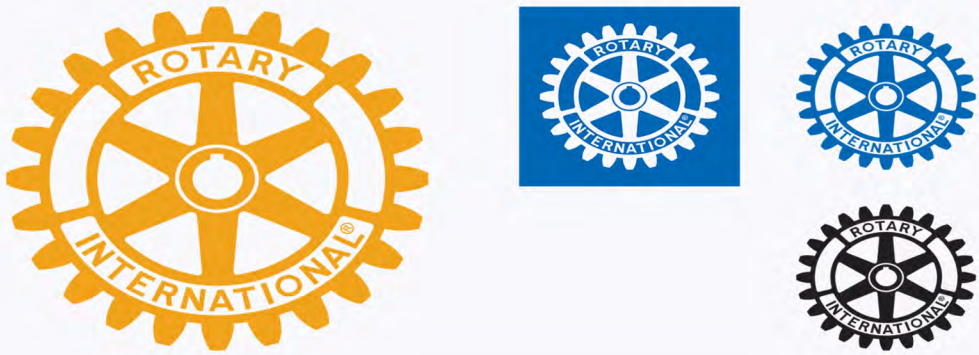
When using the Mark of Excellence, we encourage you to use the Masterbrand Signature near it for clarity and recognition. The words "Rotary International" must always appear in the wheel.

There is no maximum height for the Mark of Excellence, the minimum size should be approximately 3x height of the wheel in the nearby Masterbrand Signature (see layout and sizing examples above).

Masterbrand Signature

Masterbrand Signature Simplified

Mark of Excellence



Logos — Signature System

Use the name on your charter or the name your club is known by in your community in your club logo. Because the word "Rotary" is already in the logo, you don't need to repeat it.

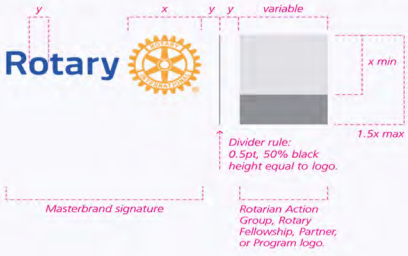
The club name, district, and zone always appear on the same side as the wordmark, it should right-align with the "y" in Rotary. The positioning and the size relationship between the wordmark and the wheel can't be altered.

Signature System for Clubs, Districts, and Zones

Logo Lockups

Partners are external organizations that collaborate with Rotary to develop, support, and execute programs and service projects.

To create partnership lockups, follow the guidelines illustrated here. Only one partner may be displayed within the lockup.

The same layout applies for Rotary Fellowships and Rotarian Action Groups.

Lockups for Rotary Fellowships, Rotarian Action Groups, Partners, and Programs