

LONE STAR P.E.T.S. 2019



February 28-March 3, 2019

PRESIDENTS-ELECT WORKBOOK

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

Dear Presidents Elect:

Congratulations on your selection as the 2019-2020 President of your Rotary club. You have the increasing efforts in needed areas.

Our goal at Lone Star P.E.T.S. is to assist you in the preparation for your presidential year. You are already off to a good start by attending as a president elect. Please note we cannot, and should not, be your only training to be president. Know that you have former presidents in your club who can assist as mentors. We encourage you to reach out to them.

We also encourage you to develop a good relationship with your president nominee. Likewise your districts have training sessions that should be utilized. I highly encourage you to visit other clubs and see how they operate. Every Rotary club is different.

This work book is the product of many volunteer hours. After numerous planning sessions with your district governor elects, and Curriculum Chair Sharron Miles, have put together an outstanding program from which 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 question of your facilitators; visit the vendors in the House of Friendship and be inspired by our speakers. Since we are always trying to improve our learning process, please take time to complete the evaluations.

May the next two years be your best years in Rotary yet.

More importantly: HAVE FUN!!!!

It will be a great ride.

Yours in Rotary

Ean Sullivan

Lone Star P.E.T.S.

2019 Operating Chair

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

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

SESSION C-9 ARE YOU A LEADER WHO LEADS?

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

Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

FRIDAY, March 1, 2019

SESSION A-1

BECOMING A VIBRANT CLUB LEADER

GOAL

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

OBJECTIVES

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

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

REFERENCE MATERIALS

Lead Your Club: President -- "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.

Reconnect

News about Rotary alumni.

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

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

Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

FRIDAY, March 1, 2019

SESSION A-2

STRIVING TO BE A VIBRANT ROTARY CLUB

GOAL

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

OBJECTIVES

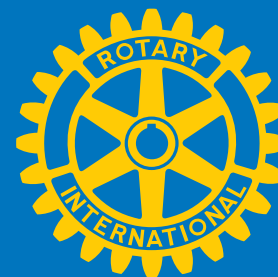
At the end of the session, Presidents-elect will be able to:

1. Outline the goal planning process for setting goals and developing action plans for the club
2. Explain the benefits of strategic planning and sound fiscal management 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



How would you rate your club? Typically, Rotary clubs with a strategic plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help you set long-term priorities and goals, all of which will support your club's vision. It's designed for Rotary clubs, but districts can use it too. As you prepare a strategic plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan's development and use.
- Ask an unbiased facilitator to run strategic planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club's goals reflect those of your district and [Rotary's strategic plan](#).

The Strategic Planning Model

Create a vision for your club, with strategic priorities that will help you achieve it. Then set yearly goals that support each strategic priority.



Strategic Planning Worksheet

1. Where are you now?

List the opportunities and challenges facing your community.

When checking your club's current state, use [Rotary Club Central](#), [Rotary Club Health Check](#), [Membership Assessment Tools](#), and your region's version of [Be a Vibrant Club](#) to see what your club is doing well and what it could improve.

Club strengths

Club weaknesses

--	--

Opportunities for the community (such as new businesses, growing population)

Challenges facing the community (such as economic decline, competing services)

--	--

2. Where do you want to be?

List five to 10 characteristics that you would like your club to have three to five years from now.

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community — e.g., “Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)

3. How do you get there?

- Set strategic priorities that will help your club achieve its vision, considering:
 - The club's strengths and weaknesses
 - The goals of the Rotary strategic plan, those of your district, and those of your regional membership
 - Programs and missions of Rotary International and The Rotary Foundation
 - Your community's opportunities and challenges
 - Members' opinions
 - Achievability in three to five years
- Get the team to choose the most important strategic priorities — those that will have the biggest impact as your club works toward its vision.
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.
- Use Rotary Club Central to help set goals and track achievements.

Strategic priority 1: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 2: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 3: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

4. How are you doing?

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan, and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.

List steps that your club should take to track its strategic plan, including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.

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

Alumni networking events (no/yes)

Conduct a Member Classification Study (no/yes)

Club Members Talking with Media (no/yes)

Development Program for Members (no/yes)

Collaboration with a non-Rotary partner (no/yes)

STRATEGIC PLAN

OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

OUR STRATEGIC GOALS



Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels



Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally



Enhance public image and awareness

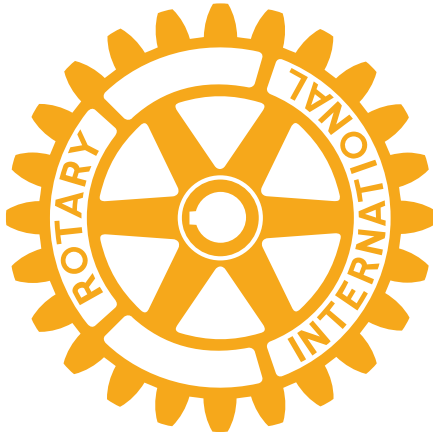
- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities



We are leaders who act responsibly and take action to tackle some of the world's most pressing challenges.

REPORT TO THE 2018 CONVENTION

FROM JOHN HEWKO, GENERAL SECRETARY



At the Secretariat, we support Rotarians and all that you do to connect and take action to transform and inspire communities around the globe. As we join together for the 2018 Rotary Convention, here is an overview of the productive and eventful 2017-18 year.

SUPPORT AND STRENGTHEN CLUBS

This year, we added value to your Rotary experience by enhancing services and online tools that support clubs' efforts to grow and to increase Rotary's impact, locally and globally.

- Membership in our organization exceeds 1.2 million. As part of a long-term membership strategy, we've found ways to revitalize the traditional Rotary club experience and created online materials, including [new membership courses](#) and the [Engaging Younger Professionals toolkit](#) to help you attract, retain, and engage new generations of Rotarians and alumni.



- The [Manage Membership Leads](#) pages of My Rotary for [clubs](#) and [districts](#) help Rotarians connect with prospective members, relocating members, and those referred to Rotary by current Rotarians. In 2017-18, we received more than 20,000 membership inquiries, which resulted in, on average, a gain of four new members a day.

Support and Strengthen Clubs, continued

- We emphasized the increased **flexibility** clubs now have to explore new meeting formats, offer alternate meeting times, or adjust their meeting frequency, all strategies that help meet the needs of current members and attract new ones. We have collected numerous examples of how clubs create new models to engage members, and we're always looking for more. **Please share yours.**
- To help Rotary attract more alumni, women, young professionals, and recent retirees, we provided new and updated **resources for clubs**. We're also targeting outreach to club leaders to make sure they know about available resources to address the challenges they face.



- Rotary's network of **alumni** reflects the vast connections that people have formed through our many programs. Of the 428,862 known program alumni, 51,480 have created My Rotary accounts to join our online community, and 15,689 alumni are already Rotary club members.
- In October, we celebrated the third annual Rotary Alumni Reconnect Week. More than 1,400 alumni and Rotarians shared stories and photos during the digital event. Overall, Reconnect Week posts reached more than 188,600 people on various social media platforms, highlighting the connection between program alumni and Rotary service.



- This year, on 13 March, **Rotaract** celebrated 50 years of service, friendship, and fun. Over 10,000 Rotaract clubs in 184 countries celebrated this milestone at events during World Rotaract Week. From planting trees to feeding the homeless, from promoting access to education to fundraising for The Rotary Foundation, Rotaractors showed how they are people of action. And these dedicated young leaders are redefining what it means to be a Rotarian. Many who are members of both Rotary and Rotaract are helping start flexible Rotary clubs.
- In July 2017, we launched a streamlined **Rotary Club Central** to make setting and tracking club goals quicker and easier than before. About 20,000 Rotary clubs are using it, tracking more than 80,000 service projects.
- Building on the successful relaunches of **Rotary.org** and Rotary Club Central, we are working on an ambitious project to completely revamp our member site, My Rotary. Using a research-driven, user-focused approach, we are retooling the site to make it faster and more personalized. It will contain all the tools and data that members need to connect with one another.



FOCUS AND INCREASE HUMANITARIAN SERVICE

Polio eradication remains our top organizational priority. Rotary's work to end polio is a perfect example of what people of action can accomplish together. Working with our partners, we made great strides this year in fighting this disease. We also increased Rotary's ability to provide humanitarian services by enhancing tools clubs can use, such as the Grant Center, to develop more sustainable projects that will continue to make a positive impact on communities.

POLIO ERADICATION

- Fewer children were paralyzed by polio in 2017 than in any other year in history, with 22 cases reported in just two countries: Pakistan and Afghanistan. Rotary and its partners increased efforts to vaccinate children in the countries where polio remains endemic, with a focus on reaching nomadic communities in Pakistan and internally displaced people in Nigeria.
- As we continue our efforts to vaccinate children in these last enclaves of polio in the year ahead, we also remain focused on protecting hundreds of millions of children from the disease in polio-free countries.

- At the 2017 Rotary International Convention, global leaders came together to pledge \$1.2 billion in additional financial resources for polio eradication, and to reaffirm their commitment to achieving a polio-free world. As part of this historic moment, Rotary announced an increased funding commitment of \$50 million per year over the next three years, and the Bill & Melinda Gates Foundation committed to a 2-to-1 match. Thanks to the Gates Foundation's match, Rotary's contribution will triple, making for an additional \$450 million in resources for polio eradication efforts.



- On 24 October, Rotary clubs around the world celebrated World Polio Day, using it as an opportunity to raise awareness and funds and to advocate in their communities. In 2017, 3,671 Rotary clubs registered World Polio Day events in 102 countries — up 151 percent from 2016.
- Rotary documented the lessons learned from our polio eradication efforts in an extensive report. As we get closer to realizing the dream of a polio-free world, we have reviewed what we learned along the way in order to benefit future Rotary priorities and initiatives.



ROTARY GRANTS

- In January, we unveiled changes to the global grant reporting section of the Grant Center, streamlining and simplifying the content and layout so clubs can more easily report on the tremendous work they accomplish through global grants. As a result of this effort, the time it takes to process a grant application has already dropped by 11 percent.
- Starting 1 July 2018, any club or district that applies for a global grant to support a humanitarian project or a vocational training team must first conduct a community assessment and include the results in their grant application. We have been working with club members to prepare them for this global grant community assessment requirement.
- Global grants' popularity continues to grow. As of May, 1,000 global grant applications were approved. Over 85 percent of districts and more than 10 percent of clubs worldwide are participating in global grants.
- As of May, 458 district grant applications were approved — representing nearly 85 percent of districts worldwide — that support more than 12,000 activities.

THE ROTARY FOUNDATION

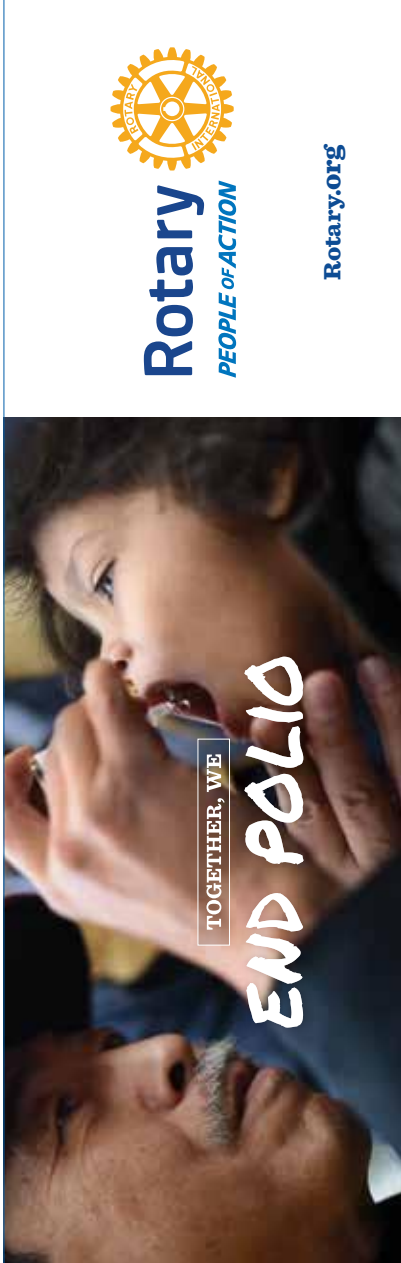
- To launch The Rotary Foundation into its second century of service, a \$360 million comprehensive fundraising goal was set for this year. As of 30 April, Rotarians and friends of the Foundation have contributed \$328 million toward this goal.
- For the 10th consecutive year, the Foundation received 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.
- Rotary's vision for a more peaceful world is becoming a reality thanks to the Rotary Peace Centers program. Since the peace centers launched in 2002, 1,161 program alumni are working in more than 100 countries. Currently there are 109 fellows studying (86 students are working on their master's degree and 23 are enrolled in our certificate program). As of 30 April, \$7 million has been raised for the program this Rotary year.



ENHANCE PUBLIC IMAGE AND AWARENESS

Invigorating our brand strengthens Rotary’s image as we spread the word about the work we do. This year, we continued to invest in strengthening our brand by launching our People of Action messaging and public image campaign and by promoting our humanitarian efforts, The Rotary Foundation, and our ongoing fight to end polio.

- The **People of Action** campaign is gaining momentum as clubs and districts feature how Rotarians are leaders who work together in communities to inspire, transform, connect, and celebrate what’s possible. By using the new suite of assets available on the Brand Center — including print ads, social media graphics, outdoor ads, video public service announcements, and digital web banners — clubs all over the world have shown their community how Rotarians are people of action.
- The Rotary **Brand Center** is a key online tool that helps clubs create their own visual and digital materials. As of 1 May, the Brand Center had 792,892 visits and 619,760 asset downloads, including a new social media guide for clubs.



- Rotary's role in the fight to end polio was featured in more than 150 leading media outlets, such as Time, CNBC, Radio SABC, the Guardian, Forbes India, Scientific American, and Pakistan Today.
- World Polio Day content was shared through social media by celebrities, Rotary polio ambassadors, organizations and Global Polio Eradication Initiative partners for a combined cumulative reach of more than 16 million viewers. This helped us increase our social media reach significantly.
- Rotary was also featured positively during the 2017 Rotary International Convention, with 150 news stories appearing in several top-tier media channels.

- Rotary's global social media presence grew significantly to more than 2.2 million fans and followers overall, including a 22 percent combined increase across Rotary's Facebook and Twitter accounts. Rotary's Instagram following increased by 44 percent this year.
- Rotary.org, one of our most prominent communications channels, was recognized as one of 20 Best Nonprofit Websites by the industry site Top Nonprofits. Rotary.org also won the prestigious Webby People's Voice Award for best association website.

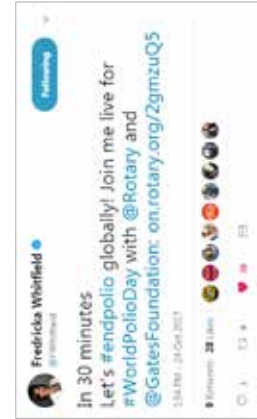
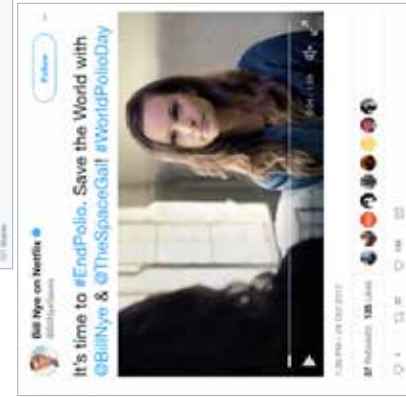
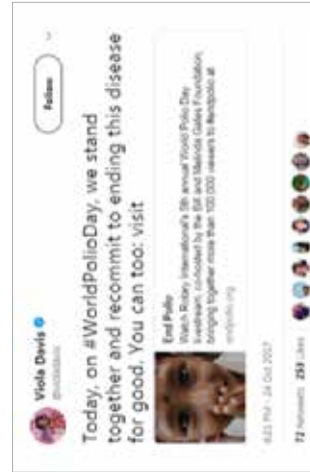


A NEW GUIDING VISION

As we close this Rotary year and look forward to what's next, we must not lose sight of where Rotary is headed in the long term. Rotary's new strategic plan, which will be developed over the next two years, will serve as the framework for our future, ensuring that we continue to be known as a respected, dynamic organization that advances communities worldwide. This year, as a first step in this effort, Rotary's Board of Directors and Trustees approved a new 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.

We are excited to help you and your club realize this vision as we set a course for Rotary to thrive and grow in the years ahead.



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Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

FRIDAY, March 1, 2019

SESSION A-3

GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

GOAL

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

OBJECTIVES

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

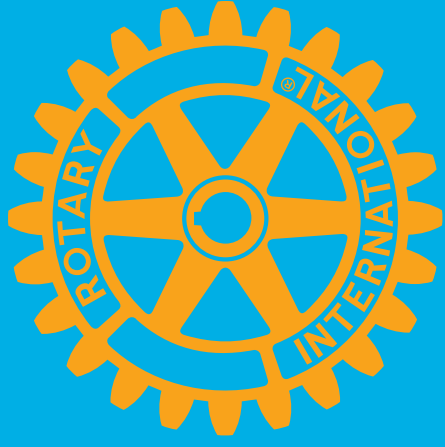
1. Share strategies and best practices to attract and engage members to improve retention
2. State how a club President can help ensure a club atmosphere that welcomes members of all ages and backgrounds
3. List key elements of club membership health

REFERENCE MATERIALS

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



IMPACT BEGINS
WITH YOU



CONNECT WITH A **ROTARY CLUB** TODAY

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

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

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



Rotary

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

CONNECT WITH US:



Rotary

THE **ROTARY** DIFFERENCE

Rotary is more than a service organization that's making a difference in your community. We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.

IMPACT ACROSS THE WORLD



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

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



WE SEE DIFFERENTLY:

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



WE THINK DIFFERENTLY:

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

HOW ARE WE DIFFERENT?



WE LEAD DIFFERENTLY:

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



OUR ACTIONS MAKE A DIFFERENCE:

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



IMPACT BEGINS WITH OUR LOCAL CLUBS

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

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

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, or ordered on shop.rotary.org with the SKU number provided. If you experience any trouble when placing your order, please email membershipdevelopment@rotary.org or shop.rotary@rotary.org.

PUBLICATIONS			
Name	Description	Audience	Available
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	http://shop.rotary.org/ (SKU: 417)
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	N/A
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	http://shop.rotary.org/ (SKU: 414)
Be A Vibrant Club	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership	http://shop.rotary.org/ (SKU: 245A)
Connect for Good	Eight-page guide shows how to get involved and connect with Rotary.	Current members	http://shop.rotary.org/ (SKU: 595)
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	http://shop.rotary.org/ (SKU: 699)
Impact Begins With You	This prospective member brochure explains who we are and what sets us apart from other organizations.	Prospective members	http://shop.rotary.org/ (SKU: 001)

LEARNING CENTER: ONLINE COURSES			
Name	Description	Audience	Available
Your Membership Plan	Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
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	http://rotary.org/learn (log in My Rotary account required)
Kick-start Your New Member Orientation	Are new members leaving within a year or two? Learn how to better connect with	Rotary members	http://rotary.org/learn (log in My Rotary account required) (log

	them and help them get involved from the start.		in My Rotary account required)
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	http://rotary.org/learn (log in My Rotary account required) (log in My Rotary account required)
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	http://rotary.org/learn (log in My Rotary account required)
Online Membership Leads	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Is Your Club Healthy?	Take this course to help your club stay valuable to your members and your community.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
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	http://rotary.org/learn (log in My Rotary account required)
Alumni Report Guide	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership	https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report

TOOLS			
Name	Description	Audience	Available
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	https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices
Rotary Club Health Check	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders	http://shop.rotary.org/ (SKU: 2540)
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	http://shop.rotary.org/ (SKU: 801)
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	N/A

RESOURCES			
Name	Description	Audience	Available
New! Club Membership Committee Checklist	Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives.	Rotary Members	N/A
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	N/A

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	N/A
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	N/A
“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	N/A
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	N/A
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	N/A
Proposing New Members	Best practices for proposing new members to your club.	Rotary members	N/A
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	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs
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	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts
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.	New members	http://shop.rotary.org/ (SKU: 426)
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders	www.rotary.org/en/news-features/newsletters
Strategic Planning Guide	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders	https://www.rotary.org/myrotary/en/document/strategic-planning-guide

WEBINARS			
Name	Description	Audience	Available
Hot, Warm, and Cold Leads: Engaging Your Prospective Members (Club Level)	Rotary volunteers and staff share best practices in communicating with prospective members, ensuring their Rotary experience is positive, and managing and admitting them through the Membership Leads platform.	Club leaders	https://vimeo.com/240685013

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	https://vimeo.com/232717098
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	https://vimeo.com/214073740
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	https://vimeo.com/180066536
Understanding Young Professionals	Led by Rotary staff and a market research professional, this webinar is intended to help members better understand the perceptions and needs of young professionals. Password: YPC	Rotary members	https://vimeo.com/89536946

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

Questions? Please contact your Regional Membership Officer:

<p>Emily Tucker emily.tucker@rotary.org +1-847-866-3258 Districts: 5610, 5630, 5670, 5690, 5710, 5790, 5810, 5840, 5870, 5890, 5910, 5930</p>
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<p>Julie Aubry julie.aubry@rotary.org +1-847-866-4480 Districts: 5390, 5400, 5420, 5440, 5450, 5470, 5520, 5730</p>

<p>Haris Sofradzija haris.sofradzija@rotary.org +1-847-866-3105 Districts: 5750, 5770</p>
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ROTARY CLUB HEALTH CHECK

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

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

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

YOUR CLUB EXPERIENCE



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

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

**SEE THE FOLLOWING PAGE
FOR YOUR PROGNOSIS**





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

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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.



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

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + Use Community Assessment Tools, Guide to Global Grants, and Rotary Ideas to improve the quality of your projects.
Social activities	<ul style="list-style-type: none"> + Put one or two members in charge of organizing socials throughout the year. + Join a Rotary Fellowship.
Leadership	<ul style="list-style-type: none"> + 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.



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

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> + Take action to diversify your club using Diversifying Your Club: A Member Diversity Assessment.
Professional diversity	<ul style="list-style-type: none"> + Make your club a microcosm of your community with Representing Your Community's Professions: A Classification Assessment.
Stagnant or declining membership	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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.



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

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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.



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

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + Develop standard processes for new members, prospective member follow-up, proposing a new member, leadership continuity, etc.
Leadership	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + Use The Rotary Foundation Reference Guide to learn about giving options. + Find best practices in Lead Your Club: Treasurer.
Managing your club on MyRotary	<ul style="list-style-type: none"> + 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



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.

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

Lone Star PETS. 2019

PRESIDENTS-ELECT WORKBOOK

FRIDAY, March 1, 2019

SESSION A-4 INCREASING HUMANITARIAN SERVICE BY SUPPORTING “OUR” FOUNDATION

GOAL

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

OBJECTIVES

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

1. Explain how support for the Rotary Foundation can help increase humanitarian service
2. Explain how participation in programs of the Rotary Foundation helps attract and retain members
3. Identify the good works accomplished through our Foundation

REFERENCE MATERIALS:

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



ROTARY'S AREAS OF FOCUS



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.



PEACE AND CONFLICT PREVENTION/RESOLUTION

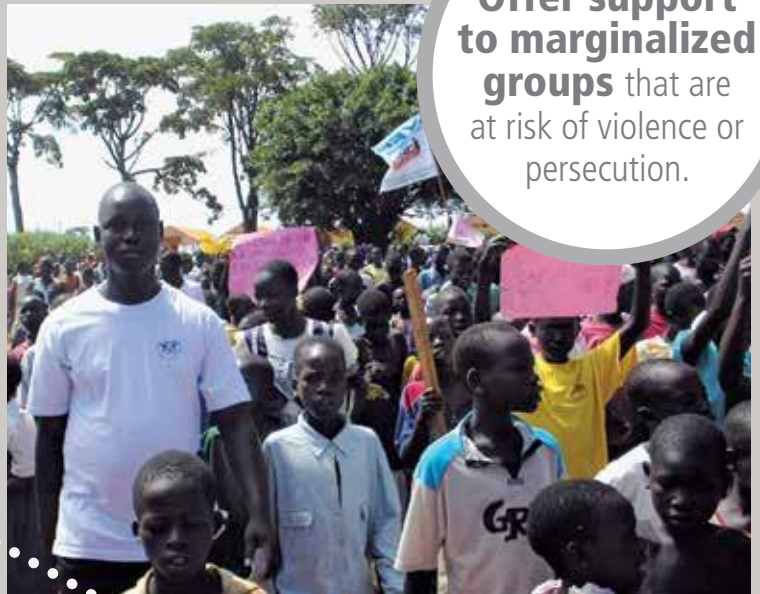
RESPONDING TO CONFLICT

20,000 people

are maimed or killed by land mines each year.

TAKE ACTION

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



TAKE ACTION

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

51 million people

are currently displaced by armed conflict or persecution.

TAKE ACTION

Provide relief to those who have fled areas of conflict.

TIPS FOR SUCCESS

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

TAKE ACTION

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

90% of casualties

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

PREVENTING CONFLICT/BUILDING PEACE

300,000 child soldiers

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

TIPS FOR SUCCESS

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

TAKE ACTION

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

TAKE ACTION

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

TAKE ACTION

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

TAKE ACTION

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





DISEASE PREVENTION AND TREATMENT

DISEASE PREVENTION

1 billion people

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

TIPS FOR SUCCESS

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

TAKE ACTION

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

TAKE ACTION

Help immunize people against infectious diseases.



HEALTH CARE

2.4 million doctors,

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

57 countries

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

TIPS FOR SUCCESS

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

TAKE ACTION

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

100 million people

are pushed into poverty each year by medical costs.

1 in 6 people

worldwide cannot pay for health care.

TIPS FOR SUCCESS

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

TAKE ACTION

Improve and expand access

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



WATER AND SANITATION

SANITATION AND HYGIENE

2.5 billion people

lack access to improved sanitation.

TAKE ACTION

Improve sanitation facilities by

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

1,400 children

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

TIPS FOR SUCCESS

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



TAKE ACTION

Promote good hygiene habits

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



IMPROVE WATER QUALITY AND ACCESS TO WATER



TAKE ACTION

Build wells

to extract groundwater from underground aquifers.

6 hours

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

TAKE ACTION

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

748 million people

don't have clean drinking water.

TIPS FOR SUCCESS

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

TAKE ACTION

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

TAKE ACTION

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





MATERNAL AND CHILD HEALTH

CHILD HEALTH CARE



TAKE ACTION

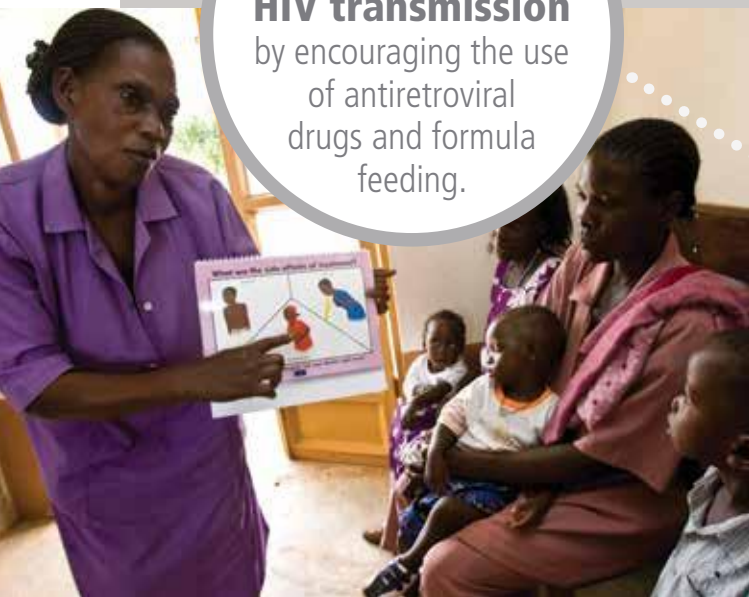
Develop or support programs that **provide immunizations and antibiotics**. Measles, malaria, pneumonia, AIDS, and diarrheal diseases are the leading causes of death in children under five.

6.3 million children

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

TAKE ACTION

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



TAKE ACTION

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



TAKE ACTION

Promote good nutrition, including encouraging breastfeeding for most infants.



REPRODUCTIVE HEALTH

222 million women

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

TAKE ACTION

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

TIP FOR SUCCESS

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

ANTENATAL CARE AND CHILDBIRTH

TAKE ACTION

Provide birthing kits to health professionals.



Women in sub-Saharan Africa face a

1 in 39 lifetime risk

of dying of pregnancy- or childbirth-related complications.

80% of maternal deaths

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

TAKE ACTION

Support accredited training programs for health professionals.

TIPS FOR SUCCESS

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





BASIC EDUCATION AND LITERACY

TEACHER TRAINING

1.7 million additional teachers

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

TIPS FOR SUCCESS

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

TAKE ACTION

Provide teacher training and needed classroom supplies.

TAKE ACTION

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



SUPPORTING STUDENTS

TAKE ACTION

Volunteer

in a classroom
or after-school
program.



57 million children

worldwide are not in school.

TAKE ACTION

Support concentrated language encounter

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

TAKE ACTION

Develop an adult literacy program.

781 million people

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

TAKE ACTION

Serve as a mentor to students in your community.



TAKE ACTION

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



TIPS FOR SUCCESS

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



ECONOMIC AND COMMUNITY DEVELOPMENT

INCOME GENERATION AND SAVINGS

190 million people

are funding their business endeavors through microfinance.

TAKE ACTION

Partner with a local microlender

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

TAKE ACTION

Develop mobile banking resources

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

TIPS FOR SUCCESS

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

JOB CREATION AND ENTREPRENEURSHIP

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.

TIP FOR SUCCESS

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

TAKE ACTION

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

TAKE ACTION

Provide equipment or supplies


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

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.



A close-up photograph of a man with glasses, wearing a blue shirt and a yellow tie, administering a vaccine to a young child. The man is looking down at the child with a focused expression. The child, a young girl with dark hair, is looking up at the man with her mouth open, ready to receive the vaccine. The background is slightly blurred, showing other people and what appears to be a public health setting.

“[Eradicating polio] in India was a monumental task, demanding an extraordinary effort by all levels of government and partners involved. Backed by more than 100,000 Rotarians across the country, we helped to ensure maximum support for everything from National Immunization Days to mop-up immunization rounds.”

**— Deepak Kapur, chair
India PolioPlus Committee**

ERADICATING POLIO

From helping achieve milestone victories to rapidly quelling outbreaks, Rotary enabled the Global Polio Eradication Initiative (GPEI) to gain crucial ground in the fight to finish the disease. Rotary is a leading partner in the GPEI, along with the World Health Organization, UNICEF, the U.S. Centers for Disease Control and Prevention, and the Bill & Melinda Gates Foundation.

Besides placing two drops of vaccine into children's mouths, Rotarians, along with health workers, helped change the hearts and minds of community leaders and parents opposed to immunization to allow children to be vaccinated. And our advocacy with government and business leaders, along with Rotarians' generous contributions, pushed forward the polio endgame plan, aimed at certifying global eradication of the disease by 2018.

PHOTO BY ALLISON KWESSELL

Notes

This image shows a full page of blank handwriting practice paper. It features approximately 28 evenly spaced, horizontal blue lines across the entire page. The lines are thin and consistent in color, providing a guide for letter height and placement. There are no margins, text, or other markings present.

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.

Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

SATURDAY, March 2, 2019

SESSION B-5 REACHING OUT THROUGH SERVICE

GOAL

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

CONDUCTING SERVICE PROJECTS



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

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

- 1. Assess the situation.**

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

- 2. Choose a project.**

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

- 3. Make a plan.**

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

- 4. Carry out your project.**

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

- 5. Evaluate your project.**

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

Need help getting started?

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

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

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

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

CONTACTING OTHER ROTARY CLUBS

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

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

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

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

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

SUSTAINABILITY

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



Start with the community

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

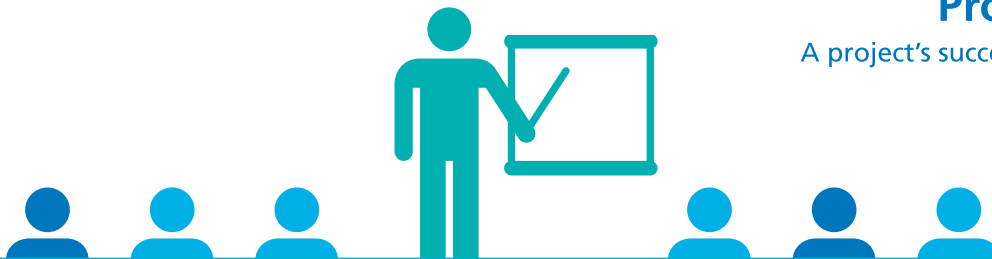
Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



Provide training

A project's success depends on people.



Buy local

Purchase equipment and technology from local sources.



Find local funding

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



Measure your success

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



What makes a service project effective?

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

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

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Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

SATURDAY, March 2, 2019

SESSION B-6 FUNDRAISING THAT WORKS

GOAL

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

PLANNING FUNDRAISING EVENTS



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

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

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

What Is Your Club Known For?

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

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

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

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

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

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

—Marty Helman

Public Image



Signature Projects Deliver Significant Benefits

By Rotary Zone Coordinator Gayle Knepper

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

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

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

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

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

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

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

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

[Read the full story.](#)

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



Rotary Voices

Stories of service from around the world

Tips for smarter fundraising

Posted on [May 11, 2015](#)



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

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

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

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

Use online crowdfunding sites

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

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

Share YOUR story

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

Put it into perspective

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

Brainstorm ideas and events!

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

Build awareness:

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

Don't forget your call to action

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

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

RATE THIS:



 19 Votes

SHARE THIS:

Notes

[illegible]

Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

SATURDAY, March 2, 2019

SESSION B-7

ENHANCING COMMUNITY AWARENESS OF YOUR ROTARY CLUB

GOAL

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

OBJECTIVES

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

1. Explain to club members the relationship of PR and membership growth
2. Define elements needed to create a positive local image and public perception
3. Articulate the role of the club president, PR committee, and individual Rotarians in enhancing the local image of Rotary

REFERENCE MATERIALS

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

KEY POINTS FOR TALKING ABOUT ROTARY



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

INTRODUCTORY PRIMARY MESSAGE

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

SUPPORTING MESSAGE

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

ABOUT ROTARY — PRIMARY MESSAGES

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

SUPPORTING MESSAGES

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

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

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

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

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

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

STRATEGIES FOR PROMOTING YOUR CLUB



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

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

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

PUBLIC RELATIONS

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

MEDIA RELATIONS

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

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

MARKETING

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

SOCIAL MEDIA

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

EVENTS

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

CLUB WEBSITE

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

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



ROTARY DAYS PHOTOS

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

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

Rotary's Vision Statement



**ROTARY
DAYS**

2019-20



This year,

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

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

— Barry Rassin, President, Rotary International

HOSTING A ROTARY DAY

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

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

TIPS FOR ROTARY DAY PLANNERS



BE THE INSPIRATION

Consider partnering with:

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



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

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Lone Star P.E.T.S. 2019

PRESIDENTS-ELECT WORKBOOK

SATURDAY, March 2, 2019

SESSION C-8 IDENTIFYING CHANGE FOR PROGRESS SAKE

GOAL

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

Leading Meaningful Change

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

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

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

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

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

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

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

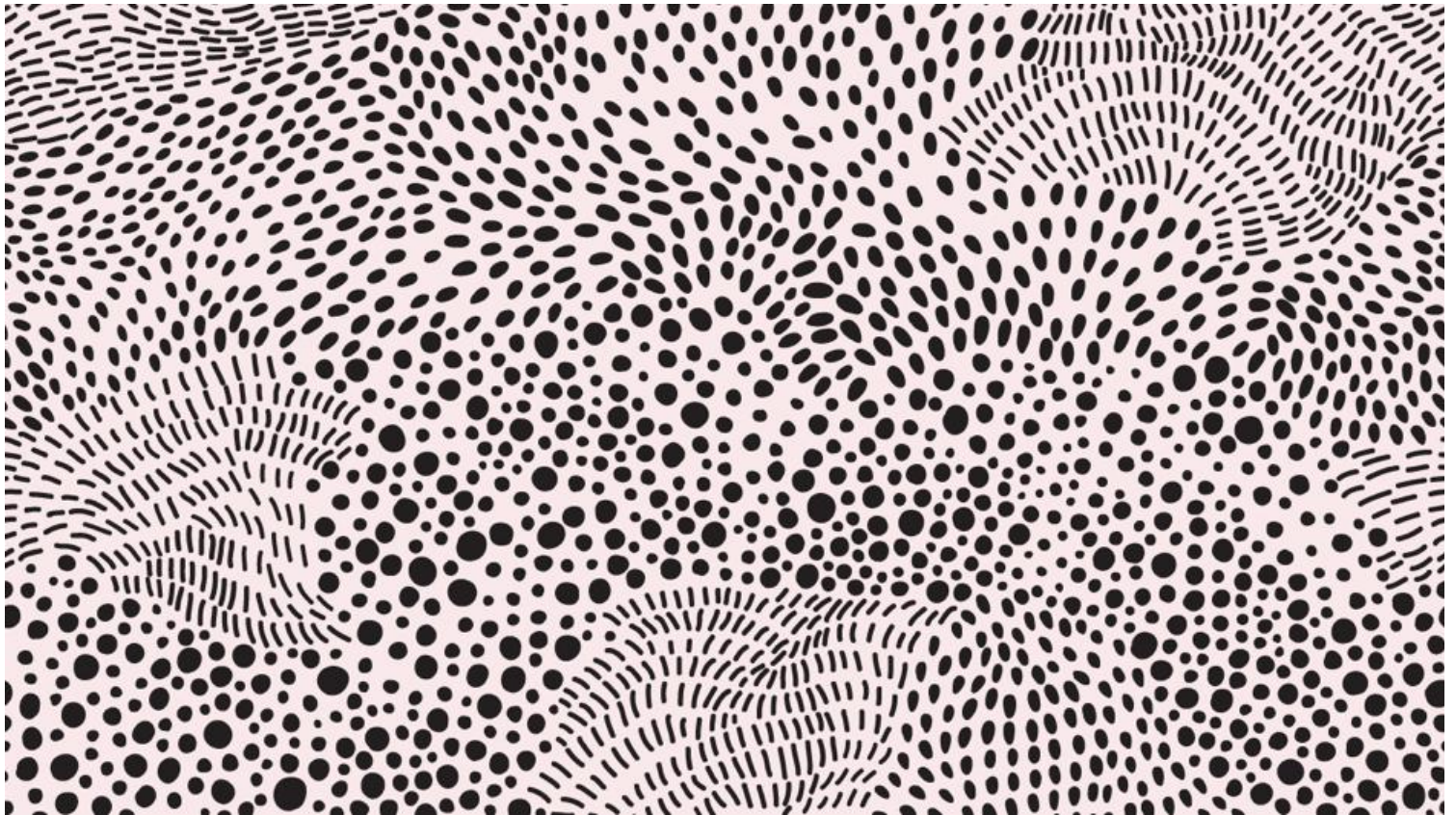
Make Change Stick – Ensuring that people continue to act in new ways, despite the pull of tradition, by rooting behavior in reshaped organizational culture. Using the orientation process, the leadership succession process, and the power of emotion to enhance new group norms and shared values.

CHANGE MANAGEMENT

All Management Is Change Management

by Robert H. Schaffer

OCTOBER 26, 2017



MARIA GALYBINA/ISTOCK

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

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

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

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

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

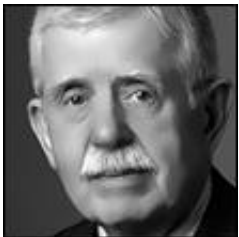
What needs to change is that thinking. Leaders should view change not as an occasional disruptor but as the very essence of the management job. Setting tough goals, establishing processes to reach them, carrying out those processes and carefully learning from them – these steps should characterize the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

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

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

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

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



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

This article is about CHANGE MANAGEMENT

 FOLLOW THIS TOPIC

Notes

This image shows a full page of blank handwriting practice paper. It features approximately 28 evenly spaced, horizontal blue lines across the entire page. The lines are thin and consistent in color, providing a guide for letter height and placement. There are no margins, text, or other markings present.

Lone Star PETS 2019

PRESIDENTS-ELECT WORKBOOK

SATURDAY, March 2, 2019

SESSION C-9 ARE YOU A LEADER WHO LEADS?

GOAL

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

OBJECTIVES

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

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

REFERENCE MATERIALS

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

Club flexibility

Since the 2016 [Council on Legislation](#), Rotary clubs have had the flexibility to choose when, where, and how clubs meet and the types of membership they offer.

5 ways to use the new flexibility

It's up to your club to decide how — and if — you want to make it more flexible. Look at the examples below to see what changes may benefit your club. After you settle on a change, remember to update your bylaws.

Here are some examples of how your club can apply the new flexible options:

1. **Change your meeting schedule.** Your club can vary its meeting days, times, and frequency. For example, you could hold a traditional meeting on the first Tuesday of the month to discuss business and service projects and get together socially on the last Friday of the month. You just need to meet at least twice a month.
2. **Vary your meeting format.** Your club can meet in person, online, or a combination, including letting some members attend in-person meetings through the Internet.
3. **Relax attendance requirements.** Your club can 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. If your club is dynamic and offers a good experience for members, attendance won't be a problem.
4. **Offer multiple membership types.** Your club could offer family memberships, junior memberships to young professionals, or corporate memberships. Each type of membership can have its own policies on dues, attendance, and service expectations. Rotary will count these people in your club membership and will consider them active members if they pay RI dues.
5. **Invite Rotaractors to be members of your club.** You can invite Rotaractors to join your club while remaining members of their Rotaract clubs. If your club chooses to, it can make special accommodations for these members, such as relaxed attendance requirements or reduced fees, as long as they are reflected in the club bylaws.

Find examples of bylaw amendments that clubs might use to try these new flexible options below, and review our frequently asked questions for more information.

Resources & reference

- [Frequently asked questions](#)
- [Rotary's governance documents](#)

- [Start Guide for Alternate Membership Types](#) (includes sample bylaws)
 - [Start Guide for Flexible Meeting Formats](#) (includes sample bylaws)
 - [Club meeting flexibility and format](#) (video)
 - [Membership Types and Attendance Flexibility](#) (video)
 - [Satellite club FAQ](#) (PDF)
 - [Satellite club application](#) (PDF)
 - [Satellite club member information form](#) (PDF)
 - [Membership Flexibility Overview](#)
-



LEADERSHIP DEVELOPMENT

The Fundamentals of Leadership Still Haven't Changed

by Ron Ashkenas and Brook Manville

NOVEMBER 07, 2018

GARY S CHAPMAN/GETTY IMAGES

Recently the Chief HR Officer for a healthcare firm asked us to identify the best new framework for leadership that she could use to train and develop a cadre of high potentials. The challenge, she said, was that these managers were highly proficient in their own disciplines such as finance, marketing, research, clinical care, and insurance reimbursement – and had demonstrated that they could manage people in these areas – but she needed them to be “bigger” leaders. What, she asked us, did the newest thinking about leadership development say they needed to learn to lead multiple functions, or influence whole segments of the organization, particularly in the rapidly changing world of healthcare?

Explicit in our HR officer's question was her assumption that the *newest* thinking on leadership development must contain something essential. After all, there are hundreds of books written about leadership every year, adding to the thousands of titles already available on Amazon. There also are new assessment tools based on advancements in brain science, emotional intelligence, and relational modeling; new computer aided algorithms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2019 PETS Resources found at: www.lonestarpets.org

A-1 Becoming a Vibrant Club Leader

Be A Vibrant Club
Be A Vibrant Club: Club Leadership Plan Worksheet
Newsletters - My Rotary

A-2 Striving to Be a Vibrant Rotary Club

John Hewko RI Report 2018
Rotary Club Central
How to Record Club Service Activities
How to Record Progress on Goals
How to Set a Goal
How to View Information
Rotary Club Central Handout
Rotary Strategic Plan
Strategic Plan - My Rotary
Strategic Planning Guide

A-3 Growing and Engaging Your Club Membership

Connect to Membership Leads
Impact Begins With You
Membership - My Rotary
Membership Assessment Tools
Membership Resource Guide Dec2018
Online Club Meetings - My Rotary
Rotary Club Health Check
Satellite Club FAQ
Starting a New Club
Strengthening Your Membership
Your Membership Plan Worksheet

A-4 Increasing Humanitarian Service by Supporting "Our" Foundation

Areas of Focus
Paul Harris Society
Project Lifecycle Resources - My Rotary
Rotary Foundation Facts
Rotary Foundation Reference Guide

B-5 Reaching Out Through Service

7 Features of a Highly Effective Service Project
Communities in Action: A Guide to Effective Projects
Community Assessment Tools
Conducting Service Projects
Effective Service Projects
Six Steps to Sustainability

B-6 Fundraising that Works

Fundraising - My Rotary
Planning Fundraising Events
Promote Rotary Through A Signature Project
Signature Project
Tips for Smarter Fundraising - Rotary Voices

B-7 Enhancing Community Awareness of Your Rotary Club

Key Points for Talking About Rotary
Public Relations - My Rotary
Rotary Days Brochure
Strategies for Promoting Your Club
Telling Rotary's Story
Using Rotary Marks
Why and How to Host a Rotary Day - My Rotary

C-8 Identifying Change for Progress Sake

All Management is Change Management
Leading Meaningful Change

C-9 Are You a Leader Who Leads

Club Flexibility - My Rotary
Membership Flexibility Talking Points
Six Principles for Developing Humility as a Leader
The Fundamentals of Leadership Still Haven't Changed

General

Be A Vibrant Rotary Club
Lead Your Club President 2019-22
RI Club and District Support

Websites

<https://brandcenter.rotary.org/en-GB>
<https://learn.rotary.org/members/learn/catalog>
<https://my.rotary.org/en/learning-reference/document-center>
<https://rcc.rotary.org/#/dashboard>
www.endpolio.org
www.polioeradication.org

Breaks at Lone Star PETS 2019

There should be a break Friday morning in the Hall of Friendship between 10:15--10:45 AM for everyone at the same time.

Friday afternoon: 2:30--4:00 PM

First Group: Industry & Leadership Wings & Innovation Rooms;
2:30--3:00 PM

Second Group: Made In Texas Rooms; 3:30--4:00 PM

Saturday Morning: 9:30--10:45 AM

First Group: Industry & Leadership Wings & Innovation
Rooms; 9:30--10:00 AM

Second Group: Made In Texas Rooms; 10:15--10:45 AM

Saturday Afternoon: 2:45--4:00 PM

First Group: Industry & Leadership Wings & Innovation Rooms;
2:45--3:15 PM

Second Group: Made In Texas Rooms; 3:30--4:00 PM

