

**Educational Session Notes**  
**Telling Rotary's Story Public Image**  
**Training Leader—Corey Lopardi**

**4:45 PM**

**9:30 AM**

**Brand**

- Logo
- Culture
- Identity

**Members**

- Meeting time
- Events
- When & Where
- Accomplishments
- Working on

**Potential**

- Current projects
- Why
- Variety of things
- International

**General Public**

- Accomplishments
- Who we are
- How they benefit
- What we are doing

**Powerful Storey**

- Real
- Personal
- Image of serving others

**Club vs video**

- Some area to improve on
- Great Rotary experience

- Name tags on tables – that’s where you sit – mix it up
- Tight clubs not always best for visitors
- Playing cards on tables – matching card at door – that is where you sit
- Consistency is your brand
- Consistency across club
- Put ourselves in place of guest and do it properly (invite, meet early at door - networking not when meeting starts)

#### Engaging members

- Welcoming
- Fun
- Good community projects
- Mentoring
- Purpose for members - welcoming
- Follow through
- Shorten membership process
- Careful in recruiting
- Get them in as a member right away
- Thank You to guests – gift & thank you
- Offer a separate lunch to share more info
- Approach carefully expectations
- Explain what to expect prior

#### Vibrant club

- Active in community
- Engaged
- Diverse
- Decent attendance

**1:45 PM**

#### Tell Rotary’s Story

- Branding-logo
- Mark of Excellence-Rotary
- Master Brand
- Brand Center
- <http://brandcentre.rotary.org> !

#### Story

- making a difference
- from the heart
- promote and update “What we do”
- first impression

- tight knit group
- welcoming feeling
- acknowledging people when they come in
- Rotary fills a need !

#### Public Image (Join/Stay/Be Engaged)

- projects
- variety of duties
- select members on potential commitment
- opportunities for fellowship
- follow-up with visitors
- information table
- engage new members
- meetings also fun\
- Interact

**3:45 PM**

What is a Brand?

1. What you stand for
2. Recognition
3. Marketing

What are some of the messages we want to communicate with current members?

1. Service Above Self
2. Meeting info
3. Fundraising
4. Club News
5. Projects

What are some of the messages we want to communicate with potential members?

1. You are welcome here
2. What we do and why we are here

What do we want to communicate to the Public?

1. Stories of Rotary

What helps people join and ways to stay engaged?

1. Club is welcoming
2. Club has a greeter
3. Banner to advertise what the club does
4. Recite the 4 way test
5. One on One contact with new members- gets them involved right away in projects
6. Having good programs- think outside of the box
7. Good follow up with members- get together for a cup of coffee outside the regular meeting
8. Utilize the RI videos
9. Recognizing individual members more often during the meeting
10. Making sure the meeting is a good fit for the club
11. Meetings that could be partnered with other organizations- invite guests to
12. Having Youth Exchange students come back to talk to the Club and invite guests

What is a Vibrant Club?

1. Successful
2. Engaging
3. Flexible
4. Has a plan for following years
5. Measures what has been accomplished
6. Has a strategy to grow new leaders

A Rotary Moment is your story as to why you are in Rotary with details and emotion

**Training Leader—Sean Hogan**

**4:45 PM**

**9:30 AM**

**1:45 PM**

**3:45 PM**

**Training Leader—Rod Thomson**

**4:45 PM**

**What is a brand?**

- Recognizable image
- Identity of an organization

**What are some established brands?**

- Starbucks
- Kleenex
- Nike
- Apple

**Why do people join Rotary?**

- The ideas listed in the survey
- Networking

**Why do people stay with Rotary?**

- Impact of work done by Rotary
- Friendship
- Fellowship
- Listening to classification talks again by senior members
- As they age within the club
- The ideas listed in the survey

**How does diversity affect your club?**

- The range of ages
- Representative of the community
- Aspect of every member for projects
- The ideas listed in the survey

**How does Steve's experience mirror your club, or not?**

- Engaging speakers
- Cheque writing versus hands on engagement
- Connecting views and why to the club
- Revolving slide show in the background during meeting
- Member assigned to look after a new guest

## **What is a vibrant club?**

- Active
- Energetic
- Fun
- Clear vision
- Engaging and dynamic
- flexible

**9:30 AM**

## **Rotary's Brand**

1. Fellowship
2. Leadership
3. Networking
4. International

## **Seigel-Gale Survey**

### **Why do members join?**

1. To serve their community.
2. To network

### **Why do they stay?**

1. Satisfied with achieving personal goals
2. Fellowship
3. Friendship

### **What is missing in Rotary?**

1. Shifting globally, members are aging out, more commitments
2. May need to be refreshed

## **Diversity**

1. Gender Diversity
2. Difficult to attract Latino members of the community
  - a. Suggestion: consider engaging organizations that support the Latino community
3. Club is not well culturally, but is economically and politically diverse
4. Young professionals join for personal development
5. Several large clubs have added Under-40 programs (Portland, Yakima) to develop and engage younger members. Sponsorships from employers for U-40

## **Why do they join?**

1. If they joined for networking, they tend to leave.
2. Focus on friendship and community

## **Why do they stay?**

1. Fellowship and Community
2. Networking shifts to friendship

## **Rotaract Response**

1. Joined for networking and to connect with Rotarians
2. Stay for friendship
3. Limited funds – not much international focus
4. University-based' lots pf cultural diversity
5. Mostly women; few men while sponsoring club is mostly men

### **Steve Lingenbrink Video Elements**

1. Passion
2. Powerful
3. Inspired
4. Challenged
5. Engaging
6. Humorous
7. Reluctant
8. Accepted
9. Committed
10. Real/Genuine
11. Emotion
12. Transformed
13. Informative Message
14. Family involvement

### **Combined Tables of 4 Larger Tables to Encourage Interaction – Comments/Learnings**

1. Be sensitive to inside jokes to explain to new member
2. Don't use acronyms, e.g., PETS = President Elect Training Seminar
3. Have a designated host for guests, reserved spots to ensure interaction
4. Ensure members are welcoming
5. Have a tag line for the President and use at each meeting, e.g., "Rotary brings leaders together to exchange ideas and take action in communities around the World".

**1:45 PM**

Why they stay

1. Friendship
2. Service
3. Reputation

Diversity

1. Age difference communication
2. Classification
3. Mentor

1<sup>st</sup> Visit

1. Welcoming
2. Inspiring
3. Enthusiastic



4. Personal
5. Convicted
6. Intentional

Make club visits better

1. Venue
2. Meals
3. Cultural
4. Free meal
5. Respect for time
6. Good speakers
7. President in-person thank you
8. Purpose of club in local service

**3:45 PM**

**Training Leader—Anna Harrison**

**4:45 PM**

**What is a Vibrant Club?**

- Fun
- Active energy
- Engaged
- growing
- difference
- community involvement
- socials
- projects
- mentoring
- “feel good” meetings
- proud memberships
- not “cliquey”

**Small Groups: How do you get people to join, stay, and engage with your Club?**

- Creating friends and connections
- Co-chair for committees – seasoned Rotarian with a newbie. Mentorship benefit for younger professionals
- Young people join for professional mentorship
  
- Demographic different: size & range of members
- Consistently carry out activities
- Have purpose in meeting

### **Other Tools**

- local partners
- farmers/merchants nights
- social media
- radio
- free membership to reporter
- high school student of the month
- float in the parade
- “Unity” project – 13 clubs

**9:30 AM**

**1:45 PM**

Someone will never know the value of a moment until it becomes a memory – Dr. Seuss

Membership and Public Image Intertwine

Siegel & Gale Survey from 2011 – Anna explained the survey and encouraged those present to review it.

Ways to improve our image and engage our membership:

- CNN rates the RI Foundation one of the top 5 in the world.

- 90% of funds go towards programming – actually, this is misleading, as 100% of the funds return to programs, but the way it is reported is at 90% because staff are paid through the interest.
- Rotary International received the outstanding foundation award in 2016.

Howard had some great slides that explained the way funds are allocated through Rotary International.

- Endowment
  - One Billion Dollars
  - 350 Million in Cash
  - Cash is moved every three years
- Annual Fund
  - Every Rotarian Every Year is here
  - Receives close to 120 million annually
  - 100% is spent
  - Interest covers administrative costs
  - Funds are allocated to districts on an every-three-year basis (i.e., what we give is returned to us three years later – so what we give in 2016 will return to our District for grants in 2019)

There was additional discussion on the types of donations.

- Every Rotarian Every Year
- Sustaining
- Paul Harris Fellow
- Paul Harris Society
- Benefactor
- Major Donor
- Bequest Society
- Arch Klumph Society

DDF:

- 50% back to district 3 years later
- 50% to RI endowment
- Uses: District grant used in one Rotary year (it is a reimbursement grant)
- Uses: Humanitarian/Scholarships/Vocational Training

World Fund:

- Managed by Rotary
- Primary Use: Global Grants
  - More than one year
- Fits one of six areas of Rotary Focus

Other:

- Polio Plus
- One of Six Peace Centers, Worldwide
- Endowment Funds

Benefits to:

- Scholars

- Communities
- Individuals
- Families
- Children
- (Future Rotarians!)

Prepare for your leadership exit:

- Mentor next president
- Create a smooth transition
- STAY ENGAGED
- Join the President's Council.
- Help to get the next two presidents into place.
- Build on the momentum of a group that meets regularly – this impacts the entire club.
- Discuss who could be in charge of programs – could be the PE or Vice Chair.
- Consider a two-term presidency – then go out and find your own replacement.

**3:45 PM**

Rotary branding – what do we like?

- It is clear and it says “Rotary”
- Make sure your Website and Facebook pages have the new brand
- Use the proper colors and brands – see the new branding info at [Rotary.org](http://Rotary.org)

Membership and Public Image are intertwined

Siegel+Gale Survey

- Majority of people joined and stayed for community and friendship,
  - So, be sure to create connections to friends and community by creating experiences to share (including how you conduct meetings)

Steve's Rotary Story – What made his story powerful?

- Personal
- Positive

What image does your club present?

- Treat folks like part of a family, make them part of our culture right away
- Have a personal greeting and introduce them to president and others in the room
- Pay for their meal

Compare your club to the one in the video.

Discuss: How do you get people to join, stay, and engage with your club?

- Wearing the Rotary symbol in public
- Invite to join you for a meal
- Talk about why we joined
- Don't let anyone be a wallflower – keep in touch
- Publish what individuals are doing in the local paper (e.g. made a tiny library) – put the Rotary wheel on it.
- Have FUN at the meeting
- Help people explain why they are Rotarians and why they keep coming
- Fine people at tables if there is no visitor – or reward those people who bring visitors (e.g. put names in a hat for a prize quarterly)
- Get an insert in the local paper – put in member profiles – highlight younger Rotarians. Invite people to visit your club to meet them.
- Use the internet to get new member leads (e.g. Facebook or LinkedIn)
- Have good content on your website! People will “Google” to see what your club is all about.
- DON'T – there was no clear process as to how to join, when a guest has to pay for lunch or when not, what the process is to join, where the application form is, how long the process is, why things take so long to join...It can take WAY TOO LONG!!!
- DO – make the proposal process crystal clear and the vetting and induction process efficient.
- We go to the Welcome Wagon and put a card in their packet inviting new residents to come to the club and enjoy lunch with us. We introduce these people to others in the community. (Be careful to not overwhelm them to join.)
- Invite a visitor to a face to face “coffee” to have a personal connection and find out how Rotary can meet their interests and needs.

### **What is a Vibrant Club?**

- Active and Engaged
- Fun, Energetic
- Growing
- Work Hard- Play Hard
- Enthusiasm
- Community Support
- Open, inviting and engaging
- Unique and identity

### **Visioning**

Craft a vision

- Do it every 4-5 years
- Engage your club in your vision
- Have a cross section of members involved

Set goals to realize your Vision

- Why is your club great?
- Celebrate small successes

Groom leaders

- Seek feedback

- Provide support and training

### **Communication**

How to communicate – use a variety

- Newsletters, emails, social media, in person

### **Flexibility**

- Find out what is working? What isn't?

### **Revitalize your club**

- Explore traditions and create new experiences.
- Engagement – how to measure it?
  - See who is attending, doing service, fundraising, committee work
  - Follow up with folks who are not engaged with a personal contact.
- Make sure you update your bylaws since RI has updated bylaws as guidelines.

### **Write your own Rotary Story**

– Think of a time where you felt genuinely moved to be part of Rotary

- Who was involved?
- When/Where did this happen?
- Keep your story short
- Does this help my story?
- Details make the story feel alive.