PACIFIC NORTHWEST PETS

PRESIDENT-ELECT WORKBOOK AND REFERENCE

Rotary
Pacific Northwest PETS

SEATTLE, WASHINGTON

FEBRUARY 17-19, 2023

Welcome to Pacific Northwest PETS. This weekend-long seminar is designed to prepare you for the year ahead when you will lead your club. It is a unique blend of small and large group discussions, high-level speakers, instruction, and networking with hundreds of other Presidents-Elect who are facing the same challenges and opportunities.

This workbook is designed to provide you with resources to support what you learned in your classes, to offer you a chance to think back to the material covered, and to stimulate you to think further.

Good luck on what will be a great year in your life. Club by club, let's take Rotary to the next level!

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Presidential Theme 2023-24

The tradition of crafting a Presidential Theme is credited to 1949-50 Rotary International President Percy C. Hodgson, who outlined a list of four objectives for his term in office. Among them were the better application of the principles of Vocational Service and dedication to world understanding and peace.

Though Hodgson's 83-word proclamation ran substantially longer than today's shorter, punchier themes, Rotarians' desire to celebrate and support their president's annual program of service has remained the same.

In the decades that followed, RI Presidents introduced theme logos, lapel pins, ties, and scarves. Theme ties were introduced in the 1990s. The first scarves showing the RI theme were designed by 1998-99 RI President James L. Lacy and his wife, Claudine, with the theme: Follow Your Rotary Dream

This is the Presidential Theme of Gordon McInally, RI President 2023-24.

See Every Presidential Theme and Logo Since 1980-81

ROTARY'S VISION STATEMENT

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

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

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

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

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

EXPAND OUR REACH

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

ENHANCE PARTICIPANT ENGAGEMENT

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

INCREASE OUR ABILITY TO ADAPT

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

CLUB OPERATIONS AND ADMINISTRATION

CLASS SYNOPSIS:

There are two important documents for your club: **The Standard Rotary Club Constitution** and your club's **By-Laws**. The Constitution is the same for all Rotary Clubs around the world. Your club's By-Laws are unique to your club. Links to the Constitution and a By-Laws Template are below.

Rotary International has defined minimum standards for a Rotary Club. Adhering to these give us the ability to use the name and symbols of the organization. Rotary's **Definition of a Functioning Club** is below.

Clubs are required to meet twice per month and there is a broad definition of what constitutes a meeting. It is up to each Rotary Club to define when and how they meet.

There are three different dues and a required magazine subscription. R.I. dues are set by R.I. and are the same for all clubs. District and Club dues are set by the Districts and Clubs and vary from club to club, District to District. For your year in 2023-24, annual R.I. dues are $75.00 and the Rotary magazine subscription is $24.

R.I. dues and magazine subscriptions are billed half on July 1 and half on January 1. Your club is billed automatically according to the number of members on your club roster on those dates. There are no refunds or adjustments. Therefore it is very important that you make sure those numbers are correct on those dates.

Clubs in the U.S. are provided with liability insurance automatically and it is included in your R.I. dues. Canadian Clubs are provided with insurance through their Districts, and pay for that through their District dues. A link to U.S. Insurance information is below. Insurance differs from District to District, so in Canada, check with your Assistant Governor on how to get information

As President of your club, you have a fiduciary responsibility to your members. While the Treasurer handles the day-to-day financial transactions of the club, it is up to you and your board to oversee and create checks and balances to deter or detect embezzlement or losses due to unsound financial practices.

CLUB OPERATIONS AND ADMINISTRATION

CLASS SYNOPSIS (cont.):

Youth safety is of the utmost importance. Meet with your District Youth Service team or chair to learn about the requirements that enable your club and its members to interact with youth.

As the President of your club, it is very likely that you are also the Chair of your Board of Directors. Just as club meetings, it is important that you run efficient and productive meetings with you Board. **Below are Ten Tips to Help You Run a Board Meeting**.

You are not alone. You have many resources available to you. Assistant Governors and Past Presidents of your club are excellent resources. You can also use Google to get a lot of questions answered. Google is more efficient than the search engine on the R.I website.

Refer to the three ideas you entered in your Idea Book while at PETS. How will you integrate those three ideas into your plan of action for your year as President?

USEFUL LINKS AND RESOURCES

PowerPoint Slides from Class

Standard Rotary Club Constitution

Recommended By-Laws Template

Rotary Manual of Procedure

Rotary Code of Policies

Rotary Club Health Check

U.S. Insurance Information

Canada Insurance – Ask Your A.G.

CLUB OPERATIONS AND ADMINISTRATION

DEFINITION OF A FUNCTIONING ROTARY CLUB

- Meet regularly, at least twice a month.
- Implement service projects that address needs locally or in other countries.
- Keep its membership list current in Rotary's database using My Rotary or an approved club management system.
- Conduct its operations in ways that are consistent with the RI Constitution and Bylaws and the Rotary Code of Policies
- Maintain an environment that is free of harassment and promptly address an allegation of harassment according to the Rotary Code of Policies
- Pay per capita dues to RI and pay RI membership and district dues without outside assistance.
- Subscribe to Rotary Magazine or a licensed regional magazine.
- Welcome visits by the Assistant Governor, Governor, or any officer of Rotary International.
- Resolve club disputes amicably and maintain cooperative relations with the District.
- Have liability insurance that is appropriate for the region.
- Comply with requests from the RI Board to terminate a member who admits to, is convicted of, or is otherwise found to have engaged in harassment as defined by the Code of Policies.
- Avoid initiating or maintaining litigation against Rotary International, The Rotary Foundation, associate foundations, Rotary's international offices, or the District

CLUB REPORTING REQUIREMENTS TO R.I.

New and terminated members reported to R.I. within 30 days.

Incoming club officers for the next Rotary year by February 1.

CLUB OPERATIONS AND ADMINISTRATION

TEN TIPS TO HELP YOU RUN A BOARD MEETING MORE EFFECTIVELY

1. Start on time, end on time.
2. Set high expectations for Board Meeting attendance.
3. Exhibit integrity and other values of Rotary . Hopefully your Board and members will, too.
4. Set an agenda with a set amount of time for each item and stick to it. If the conversation goes off track, steer it back. If it runs over, table the item and return to it at the next meeting.
5. Generally, know and adhere to the Robert's Rules of Order. And don't worry….nobody gets them exactly right.
6. Focus on the priority issues. Don't spend 70 minutes discussing unimportant things or chatting, and 20 minutes on the real issues.
7. Lead the Board to engage your club's vision. Your club most likely has a strategic plan or club vision. Guide the Board to engage the club's plan.
8. Lead discussion in a positive way. Don't allow emotions to rule any discussion.
9. Display passion and enthusiasm for the club. Enthusiasm is contagious. Other Board Members might catch it.
10. Have courage. Sometimes hard decisions must be made. It takes courage to make the right ones.

EFFECTIVE MEETINGS

CLASS SYNOPIS:

Effective meetings build fellowship, engage your members, and form a framework for your club to operate at its highest and best level.

Effective meetings give your members a chance to connect to share ideas for projects, social events, and to share their passions with each other.

Effective meetings are a chance for your members to network with each other.

There are four elements of a successful meeting: Planning & Organization, Proper Staging, Effective Timing, and Compelling Content

Your class mentioned things like using an agenda, confirming speakers, knowing what committees need to give a report, knowing who the speaker is as examples of a meeting that is well-planned and organized. How can you make your meetings better organized?

Your class talked about elements that go into properly staging a room such as temperature, audio-visual equipment working, banners and flags properly displayed, lighting, optimal seating arrangement, and having a greeter as being important to proper staging.

Another piece of proper staging was to always ask every speaker to use the microphone in a room where a microphone is required. Their self-proclaimed “loud voice” many not me loud enough for those in the back of the room who might have even a slight hearing disability.

Meetings should start on time, end on time, and the Club President is usually responsible for making sure that there is enough time for the speaker. Members who are going on too long should be reminded that others need a chance to speak as well. Each portion of the meeting should fall into the allotted time for it.

EFFECTIVE MEETINGS

CLASS SYNOPSIS (cont.)

Some effective ways to remind a person that they are going on too long is to approach them and stand near them, to politely let them know they have 30 or 60 seconds more, and in extreme cases, cut them off and let them know they can finish their story or report at the next meeting.

Your meeting should have compelling content which might include interesting speakers, appropriate humor, information about club projects, a way for members to share their personal stories (happy bucks or Sgt. at Arms. Even the food can be considered compelling content of the meeting. How can you improve the content of your meetings?

Rotary meetings should also be fun for the attendees. You talked in class about what makes meetings fun and participated in small group discussions about how to make boring meetings more fun. What do you think might bring more fun and humor to your club's meetings?

We learned that club members also have responsibilities to make the club meetings effective. The discussion that ensued brought up things like being on time, volunteering for duties, courtesy towards speakers, attentiveness and engagement

A great way to make members aware of their responsibilities would be at a club assembly, at the first meeting of the new year, at a fireside, or in the club newsletter. How will you share some of what you learned with your club members?

We talked about the new ways clubs meet. You broke into small groups to discuss how we can apply the elements of successful meetings that we covered in the class to new types of meetings such as Zoom, service projects, pub nights, etc.

We covered the importance of using a Timed Agenda for our meetings

Refer to your Idea Book. How will you integrate the three ideas you entered for this class into your year as club President?

EFFECTIVE MEETINGS

SAMPLE TIMED AGENDA

ROTARY CLUB OF YOUR TOWN

Rotary Year 2023-24 President Jane Doe

Agenda Meeting Date:_____

12:13	Ring Bell, “Welcome to Rotary, Everyone”
12:14	Call on _____, to lead Flag Salute
12:15	Call On _____, Thought for the Day
12:17	Acknowledge Guests, Visiting Rotarians
12:20	Announcements & Club Reports

_____ _____

_____ _____

_____ _____

_____ _____

12:30	Sgt at Arms_____
12:40	Raffle: _____
12:45	Introduce Speaker_____
12:48	Speaker_____ re:_____
1:08	Thank Speaker, present gift.
1:10	Adjourn

EFFECTIVE MEETINGS

IMPORTANT LINKS AND MORE ON THE SUBJECT

PowerPoint Slides from Class

Printable Editable Sample Agenda for Download

Fun Ideas for Rotary Meetings

Ideas for Compelling Content

Rotary Learning Center: Engaging Online Meetings

Ten Tips for Effective Meetings

SUCCESSFUL FUNDRAISING

CLASS SYNOPSIS:

The single most-important aspect of fundraising is to always keep the "Why" in front of your volunteers and potential donors.

Clubs raise funds to support their service projects, to donate to charities and non-profits, to build endowment funds, for scholarships and many other reasons, including operating expenses.

Common fundraisers are raffles, auctions, BBQ's, and crowd-funding on Social Media. Later in the class you had open discussions regarding specific fundraisers that others in the class found unique and successful.

Club fundraisers do more than just raise funds. They give club members the opportunity to work together and bond as friends and teammates.

Fundraisers also elevate the public image of clubs in their communities.

Fundraisers can also be a great way to introduce prospective members or community partners to the club.

Fundraisers often benefit the community by providing fun events for its citizens, giving people a sense of helping, improving the offering of social events, and can also bring community members together

The best fundraisers bring all these elements together

We discussed some of the challenges of fundraising and explored how we can turn these challenges into opportunities. For example, if the event requires more volunteers than members of your club, ask the beneficiaries of the fundraiser or members of neighboring Rotary Clubs to participate with volunteer power. There were many other examples.

Proper planning prevents poor performance. A commonly known phrase, but especially true with fundraisers. We reviewed how we might create a plan for a fundraiser. **It is reproduced below.**

The class broke into smaller discussion groups and each group was assigned a specific fundraiser. Your goal was to identify all the committees and/or committee chairs you would need for this fundraiser. Each group reported out their findings to the class. Does your club do this for each fundraiser or event?

SUCCESSFUL FUNDRAISING

CLASS SYNOPSIS (cont.):

The next part of the class was devoted to defining how we measure the success of a fundraiser and how we decide whether we should repeat it, ditch it, or improve it.

Some of the reasons that clubs would repeat a fundraiser are that it raised a lot of money, a lot was invested in equipment or materials, and doing it again the next year wouldn't require the same investment leaving more profit, the work involved was insignificant compared to how much money was raised, and that the club really rallied around this and took great pride in it.

When determining whether or not to do a fundraiser again, often a road-block is that many members of the club respond with, "Because we've always done it." Does that happen in your club?

Every fundraiser needs to be judged on its merits. Some just need to be updated and revitalized. Some fundraisers are outdated and no longer fit with the current social climate and culture.

Some reasons given for not repeating a fundraiser were that it didn't raise enough money, it burned out members with too much work, the community didn't get behind it, or that it can be replaced with an easier, more lucrative fundraiser.

As the leader of your club, it is incumbent upon you to question the effectiveness of all your club's fundraisers. Fundraisers should be reviewed each year to determine if they are producing the required or desired funding, if they fit within the culture of the club, and whether or not they should be repeated. One club improved their auction from $12,000 to $21,000 simply because the President asked them to raise more.

The rest of the class, between 20-25 minutes was spent with participants sharing ideas for fundraisers from either their own Rotary Club or one they know of. This was designed to stimulate your thinking and perhaps give you some ideas for new fundraisers for your club.

Refer back to your Idea Book to see some of the ideas you thought had merit. Would your club be interested in doing any of these fundraisers?

Service ABOVE Self

SUCCESSFUL FUNDRAISING

USEFUL LINKS AND RESOURCES

Link to PowerPoint Slides from Class

Best Rotary Fundraising Ideas

The Fun in Fundraising Article

How to Crowd Fund Successfully

Fundraisers for the Rotary Foundation

Facebook Page for Sharing Rotary Fundraising Ideas

A FUNDRAISING PLAN SHOULD:

- Identify your fundraising needs.
- Establish a budget.
- Consider and address local laws for fundraisers.
- Determine available resources in your community.
- Outline the event's logistics (such as selecting the location, ordering supplies, and arranging for set up and tear down).
- Describe how volunteers will be organized.
- Consider how to publicize the event.
- Provide ways to measure its success.

HAVING DIFFICULT CONVERSATIONS

CLASS SYNOPSIS:

At times, conflicts arise in Rotary Clubs. To resolve conflicts, we must understand how conflict happens, how it escalates, and *how* it can be resolved. Rotary Clubs that cooperate and work together are more effective as a club, more enjoyable to the members, and can do more good in their communities and around the world.

Difficult people and difficult situations sometimes require difficult conversations. This class examines conflict. **How to understand it, how to prevent it, and how to address it.**

Conflict is opposing ideas, disagreements, people taking sides, argument, incompatibility, and in the extreme example, war.

Conflict is caused by different values, different interests, different information, personalities, competition. Also, by different needs and different perceptions.

In class, we examined "What is truth?" Some answers given in class were: Facts, things that are verifiable, a known and provable thing, and what is real. Another answer was: "what we perceive to be real".

In fact, there are two filters that we all use to sort out new information as it comes to us, and thus arrive at what we believe is the truth.

The first filter is everything we know; all our life experiences. The second filter is our values. We filter all our opinions based on those two things.

It is important to know this because often conflict is the result of two or more people seeing the world in different ways, based on their experiences and their values. These differences can fuel conflict. If we understand how people filter information differently, it may help us get to the root of the conflict

There are also things that escalate basic conflicts. These are identified as "Escalators". **These Escalators are listed below.**

HAVING DIFFICULT CONVERSATIONS

CLASS SYNOPSIS (cont.):

We should be able to identify these escalators and urge those in conflict to steer away from them. We should also not use them when we are in conflict

There was an open discussion in class regarding Escalators that we have experienced, and conflict that we've seen arise in Rotary Clubs.

The best solution to serious conflict is to not let it get serious in the first place. We can do this by creating a culture in our club of open communication and trust. When our members feel connected to each other, when they feel they are valued and being heard, they will tend to want to resolve conflicts quickly and congenially amongst themselves.

One of the ways we can do this is to create a culture in the club that has a "shared truth". If members have a shared truth about the club, they will tend to be more in sync with each other and not come into serious conflict. How do we do that? By feeding the two filters that Rotarians use to arrive at their truth.

We feed the first filter, which deals with the information they get, by having a transparent club that shares all information so everyone "is in on it" and no one feels left out or uninformed. This information should flow two ways: from the club to its members, and from the members to the club leadership

Different types of things to be shared by the club **are listed below in a separate box** as well as things club members should share with their club leaders and fellow members.

If all the members of the club are "in on everything" you'll avoid the scenario of having a disgruntled member saying, "Who the heck is in charge here? How did this decision get made!?" to "Well, I don't agree with it, but I certainly understand why the decision was made", which is far less conflict. It will cut down on members silently fuming because they feel "left out"

Clubs can disseminate this information at regular meetings, through informational emails, a club bulletin, at Fireside Meetings, at Club Assemblies, and on their website

HAVING DIFFICULT CONVERSATIONS

CLASS SYNOPSIS (cont.):

Perhaps one of the best ways to prevent conflict in your club is for your members to have a common second filter: their Rotary Values

Creating shared values in Rotary is so much easier because Rotary, and its history, are so rich in values and positive concepts. Just think about the 4-Way Test. Imagine the multitude of values that are embedded in those 24 words. Other common Rotary Values and ways to share them **are listed below.**

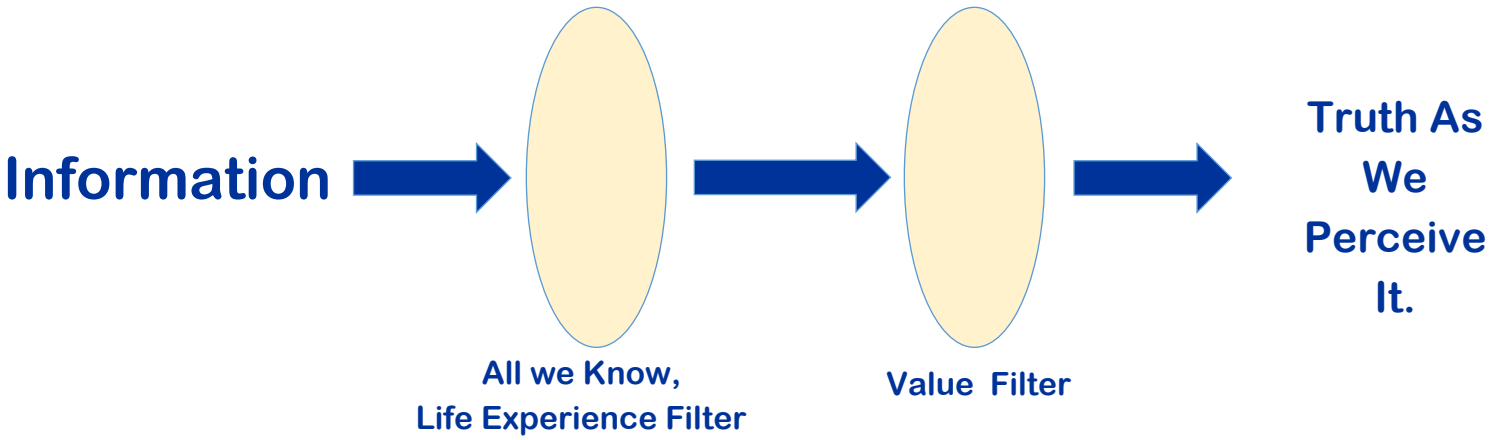
Diversity, equity, and inclusion are not political issues. Every Rotary member has the right to be treated with dignity and respect, to have equal opportunities for friendship and service, and to be given the same platforms for their voices to be heard. We can, and should, build diversity in our clubs and have it become part of our healthy club culture. For the purpose of understanding the elements of conflict, we will focus on equity and inclusion. Non-equity and exclusion are two common reasons that conflicts arise in Rotary when members feel isolated, withdrawn, and unheard.

Ways to make sure everyone in the club has equity and feels included are in the boxes below.

The goal in conflict resolution is to come away with a "Win/Win".

Ways to prepare for, and have a difficult conversation are listed below.

How can you take the ideas you wrote down in your idea book and turn them into ways that your club communicates better and feeds both the information filter and the values filter?



HAVING DIFFICULT CONVERSATIONS

COMMON ESCALATORS

- Competition (I need to win this!)
- Cornering (My back is against the wall, and I need to fight my way out)
- Ultimatums (See it my way, or else……)
- Threats (You're going to pay for having a different opinion!)
- Sarcasm (I'll mock you to make your viewpoint seem silly or stupid)
- Name Calling (Assigning blame)
- Negative body language – (I'll dismiss you)
- Personal Attack (Smear so others dismiss you)
- Confrontation in Front of Others (asserting dominance)

THINGS A CLUB SHOULD SHARE WITH MEMBERS	THINGS MEMBERS SHOULD SHARE WITH THE CLUB
Board Actions and Decisions	How They Feel About the Club
Coming Events	Things Going on With Their Families
Fundraisers	Service Projects They're Interested In
Reports from Every Committee	Things They'd Like to See Improved in the Club
Financial Position	Things They're Doing with and for the Club
Status Reports on Service Projects	Business or Professional Successes
Problems the Club is Experiencing	Rotary Activities Outside the Club
Successes the Club is Having	What Community Problems They're Concerned With

HAVING DIFFICULT CONVERSATIONS

COMMON ROTARY VALUES WE SHARE

- The Four Way Test
- Rotary's Five Core Values
- Rotary Code of Ethics
- Service to Others
- Fairness
- Leadership
- Friendship
- Fun

EQUITY AND INCLUSION

IN A CLUB THAT PRACTICES EQUITY:

All Members Get Equal Information

All Members Get Equal Opportunities to Serve as Leaders

No Single Member, or Group of Members, Has More Influence Than Others

No "Unwritten Rules" that Affect Individuals or Groups

All Members Are Heard and Responded to

IN A CLUB THAT PRACTICES INCLUSION:

All Members Have a Role in the Club

There are No Cliques in the Club

Everyone Feels Comfortable Being Themselves

Everyone Participates in Activities

The Club Reaches Out to Those Who Don't Attend or Participate

HAVING DIFFICULT CONVERSATIONS

HOW TO PREPARE OTHERS FOR A DIFFICULT CONVERSATION

- Find a time that works well for each party.
- Ask them to plan ahead how they want to present their side of the story.
- Ask them during the telling of their story to avoid blaming the other party or name-calling (**not, "You are such a mean person. You're blocking my driveway on purpose just to make me mad**.")
- Ask them to give information about how the situation affects them instead **("When your car blocks my driveway, I get angry because I can't get to work on time.**)
- Ask them to be prepared to listen without interrupting and assure them that you, and the other person if there is one, will give them the same courtesy when it is their turn to speak. Let them know that for there to be a win/win solution, everybody needs to be heard so listening will be important.

HOW TO HAVE A DIFFICULT CONVERSATION

1. Remind everyone that effective listening is going to be very important.
2. Show that you are listening. As you are listening, tell them that you hear them, and you are glad that you're discussing the problem together.
3. Ask each side to tell their story, avoiding blaming, name-calling and other escalators.
4. Don't let anyone side-step the important issues. You're here to resolve the problem; avoidance won't do that. Your solutions will work best if you talk about everything.
5. Once you've reached that point, have everyone work as a team to solve the problem. Sometimes you might be amazed at how much concession someone is willing to make when they feel it's their idea. Cooperation beats competition (like in the arm-wrestling game).
6. Avoid unspecific solutions: "I won't play my music late". A better solution is "I'll turn my music off at 9pm"
7. When agreements are in place, re-check that everyone understands theirs and the other's part.
8. Follow through. If you are one of the parties involved, do your part. If you are the intercessor, check in with both sides to see if the solution is still working.

Planning Guide and Sample Calendar

Your District Governor may also supply you with a calendar and checklist.

We developed the following checklist and calendar (actually a PLANNING GUIDE) to help the Rotary Club President plan and, thereafter, monitor Club activities on a monthly basis. You might find it beneficial to use both the District calendar/checklist and this planning document.

The purpose of this document is to be a **starting point** for YOUR planning as YOU personalize it to your district and your club. In other words, convert this calendar/ checklist into **your** plan and calendar—combining it with the District-specific dates/expectations. Just start here with this document and tailor it to make it your own. These samples have specific details and dates that may be different from your club or district. Don't let that throw you!

Now, don't forget about the current Club President. It is important some of your planning activities be coordinated with your current Club President. Two examples are requests to meet with your new officers or to hold a Club retreat before you take office. During your year as President, you will not want members unduly distracted from tasks they agreed to do for you. Naturally, you will want to extend that same courtesy to your current Club President. Be your current Club President's supporter through the end of June. They will be an important supporter for you during your year.

At Pacific NW PETS, you learned the importance of providing leadership & vision, setting and achieving short- and long-term goals, communicating with your club members and the community at large, and engaging all your Rotarians in meaningful service. Please refer to your notes from Pacific NWPETS and your own goals as you modify this calendar for your own purpose.

The Essence of Rotary

Rotary joins leaders from all continents, cultures and occupations to exchange ideas and take action in communities around the world

Rotary's Vision

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

Planning Guide & Calendar of the Rotary Club President

Prior to July 2021

Get your goals, plans and team in place.

- ✓ Select your leadership team/ Select committee chairs.
    - Draw up your list of open positions and suitable members for each position. Remember to create a balance with experience, those who are keen to contribute and first-time leaders in the Club. Have a clear understanding of the role and outcomes you want achieved in each position.
    - You may have already invited some people to be on your leadership team, to maintain their current positions for the next year with you, or have them in position on succession/strategic plans.
    - Fill vacancies using leadership insights gained at PNWPETS and from Club leaders.
    - Approach identified members in a timely manner.
    - Ensure those accepting your invitation to serve have key dates of District Conference, and District Training Assembly diarized & committed.
    - Ensure your Rotary Foundation Chair has all the details of seminars and accreditation events at which their attendance with you will be expected.
- ✓ Does your Club aspire to achieve the annual Rotary Citation? Does the Citation provide you with useful baseline goals? Incorporate those goals in your year's Club goals and plans.
- ✓ Set your year's Club goals in consultation with your Board and key committee Chairs.
- ✓ **Meet with the Club's Rotary Foundation Chair**:
    - Why *not aspire to 100% giving: all members give to the Rotary Foundation annually?*
    - Discuss and agree on giving goals to be recommended (annual fund, Paul Harris Society, permanent fund in the form of Bequest Society, Polio giving).
    - Ensure TRF qualification Memorandum of Understanding has been signed and returned.
    - Share Rotary Foundation project ideas with your Board/Club.
    - Develop a plan for implementation.

- In pursuing District or Global grants, assure the development of the requisite grant applications by the District's published due date.

✓ **Meet with your Membership Chair**:
- *For example, set a percentage of retained members as a strategy for growth; along with specific plans to reach out to them (i.e., identifying members at risk and why); Increase your female membership; Reduce the number of members leaving your Club.*
- Discuss and agree on membership net growth, new members and retention goals.
- Which tools from your zone (**Zone 28** for D5010, D5040, D5050 & D5060 and **Zone 27** for D5020, D5030, D5080, D5100 & D5110) will they be using, and do they recommend you use?

✓ **Meet with your Club Communications Team** (website, bulletin, PR, Facebook and more)
- How do you want to communicate the story of your members and your Club? Have your team plan the ongoing communications effort.
- Remember: People stay in Rotary for a sense of community and to make a difference in their communities. You want to personalize these messages to your members and your Club.

✓ Lead the Club Board in setting and approving the annual Budget for 2021-22.

✓ Provide training for your new Club Board---so all Board members understand their roles, responsibilities and obligations.

✓ Hold a planning retreat with your **Leadership Team**--to set goals and action plans for the year. Invite Club members to attend.

Consider two opportunities for positive change:

✓ Will your Club modify its Bylaws to give it the flexibility granted by the 2016 Rotary Council on Legislation regarding membership, attendance and more?

✓ How about surveying your Club members? Find out what members love & what turns members off. Ask questions such as their recommended "Three things to improve the Club experience & increase the value of the Club to our customers – Club members"?

Create a calendar and synch your calendar with your District's key events and dates.

How about creating a calendar for the entire Rotary year…….with the plans and information you have at this time. Some are specific for your Club: others are opportunities at the District and Rotary levels.

✓ Include your Club's key events, fundraisers, social events and known service activities. When are people from your Club leading international service projects?

✓ District Leadership Assembly (sometimes called DTLA). Attend it with your Club committee chairs. Invite newer members to attend. *Have someone organize a carpool? Schedule lunch with your team?*

✓ The District Conference

- ✓ District Foundation Training
- ✓ District Membership seminars,
- ✓ Social events held for presidents by the Governor and AG's,
- ✓ Special Rotary Foundation events.
- ✓ The date when your District Foundation Chair/District Governor is requiring your Club to submit its MOU (Memorandum of Understanding). This document is an agreement between the Club and its District: a commitment to implement the Rotary Foundation grant financial and stewardship requirements and to ensure proper implementation and management of Rotary Foundation Global and Package Grant funds and any District Grant funds. By executing this document, the Club agrees it will comply with all Foundation and District requirements.
- ✓ District Grants Management Seminar (attendance of certain # of persons from your Club is required as part of the MOU process)**.** Have at least one Club member attend the District Grant Seminar (in order to become qualified to receive Rotary Foundation Global or District Grants). Promote attendance by leaders/members of International and community service committees at the District Grant Seminar.
- ✓ Watch for Zone webinars, especially about membership retention. Ask your membership committee members to attend.

Get your systems in place.

- ✓ Assure your communications team has someone who agrees to update the Club website and your Club Facebook presence—so it is ready for new Rotary year.
- ✓ Meet with the people who prepare the Club bulletin to discuss any improvements you might like to see implemented. For example, some Club Presidents write a weekly message in the Club bulletin. If you are going to do this, start planning your messages.
- ✓ In USA, if your Club has a tax-exempt Foundation or a Charity, meet with the elected leadership to make sure you understand their processes and key reporting dates. You and your Club are relying on them to manage your Club foundation/charity in accordance with state/provincial and national reporting requirements. *For example, in Washington State, Club Foundations must submit 990 Tax Returns to the IRS by Nov 15th, a non-profit corporation report by November 30, and Charitable Trust Renewal & Charitable solicitations registration by May 31 annually.*
- ✓ In Canada, find out your tax and foundation reporting requirements. *For example, a T2 Corporate Return if incorporated. There may be additional filings if certain threshold is exceeded (e.g. Form 1044 Not for Profit Information Return) or if a Club carries on a commercial activity (GST Return)*

Get inspired!

- ✓ If you can, attend the International Convention in Melbourne, Australia (May 27-31, 2021).
- ✓ *www.RIConvention.org/*

Recognition Opportunities? Which will you/your Club pursue? You should start planning now.

- ✓ Do you want to honor a Club member who participates in service activities in each of the five Avenues of Service: Club, Vocational, Community, International, and Youth? Check the Rotary Website for the **Avenues of Service Citation** this month. https://my.rotary.org/en/learning-reference/learn-topic/awards
- ✓ **Service Award for a Polio-free World.** This award recognizes outstanding contributions to our polio eradication efforts. Annually, Rotary gives up to 60 regional service awards within the 6 WHO regions to worthy recipients. Rotary also give 10 international awards to people whose work has had widespread impact. Rotarians can nominate individuals---Deadline October 1.
- ✓ **Rotary Foundation Distinguished Service Award.** The Distinguished Service Award is the Foundation's highest service recognition and is given to Rotarians who have demonstrated exemplary service to the Foundation. Recipients must have received the Citation for Meritorious Service at least four years prior to be eligible for this award. Rotarians can nominate. Deadline: June 30.

Key date for President

- ✓ By June 1, enter Club MEMBERSHIP goals into Rotary Club Central.

Key dates for Club Secretary by June 30

- ✓ By June 30, update Club membership on DaCdb or Club Runner and online with Rotary International. Club membership as of June 30 is the basis for Rotary's Club Invoice (for Rotary Semi-annual dues).

July 1, 2021—THE NEW ROTARY CLUB YEAR BEGINS

- ✓ Plan an outstanding first meeting! Start with a bang!
  Have some fun and set the tone for the year.

  This first meeting *could be* an interactive Club assembly to discuss the year's goals, Club strengths and opportunities from recent Club surveys or just brainstorm other topics of interest to your Club.

- ✓ **As President, on July 1, enter your Club goals onto Rotary Club Central.**
  (Sign in at *www.rotary.org/*)!!!

Planning Guide and Sample Calendar

Your Club members will see your Club goals & accomplishments on their own *MyRotary*. Your DG and AG can access your Club's goals and understand where your Club is heading for the new Rotary year. Make sure you include goals that permit your Club to achieve the RI 's Presidential Citation.

Don't forget to update with actual accomplishments through your Rotary year.

The Presidential Citation is based on the goals AND the accomplishments you have recorded on Rotary Club Central.

- ✓ Make sure that committee descriptions are handed out along with cards for members to sign up for 2023-24 Committees (by end of July). *Full engagement means more satisfied members.*
- ✓ Encourage and support your program chair/committee in planning and promoting interesting and diverse programs for your Club. Ask all members to submit ideas to your program chair.
- ✓ Plan and conduct monthly board meeting—your first official board meeting of the year!
- ✓ Ask your Membership Committee to initiate its 2023-24 Membership Retention & Recruitment Plans.

Examples include: fielding Club surveys; implementing personalized and more meaningful inductions; scheduling Vocational Interviews of newer members; implementing meaningful ceremonies to move from new member status (red to blue badge); making sure all members are participating in Club service activities by making it easy for them to do so…what else?

- ✓ Lead by example and encourage every Rotarian to make a personal contribution to The Rotary Foundation at the first meeting of the new Rotary year or in the month of July or by year end. Encourage the use of Rotary Direct—set a monthly amount that is charged automatically to meet your personal commitment to The Rotary Foundation. Ask your Club Foundation Chair to help Club members sign up for Rotary Direct.
- ✓ Ask your Committee Chairs and officers to register and log onto MY ROTARY https://**my.rotary**.org/ to create their profile and to watch the progress towards the goals of the Club. Make sure all NEW members are given assistance in creating a profile on MY ROTARY.
- ✓ Have a knowledgeable person in the Club demonstrate to Committee Chairs and officers how to log on to Rotary Club Central to create their profile and to watch the progress towards the goals of the Club.
- ✓ Host outbound summer youth exchange student & parents at Club.
- ✓ Hold a summer picnic or some other social.

- ✓ Announce upcoming International Trips being led by people in the District or in the Zone (including Polio NID's, International hands on projects.). Don't know? Have your International Services Chair find out.

Key dates for the Club Secretary and Club Treasurer

- ✓ Ensure the semi-annual Club Report with invoice has been received by the Club Secretary and/or Treasurer. Assure the Club pays these dues to RI. Submit District per capita dues, as well.

August - Membership and New Club Development Month

- ✓ Initiate your Rotary Foundation PR campaign among your members and in your community. Piggyback onto the District's PR effort.
- ✓ Plan and conduct your monthly board meeting.
- ✓ Publish 2023-24 Club Roster (with updated information about Club members' vocations). Provide information about the Club's international projects, community service projects, educational awards, current and past Club officers).
- ✓ Attend socials or get togethers for newer members.
- ✓ Conduct Club activities to support membership engagement & recruitment efforts.
- ✓ Log on to RI '**Rotary Club Central'** and download TRF contribution and recognition reports. This task can also be assigned to the Club Secretary, Treasurer or Club Foundation chair.
- ✓ Revisit the Club's VISION and start execution of plan to implement that vision. If your Club developed a multi-year plan using "Club Visioning", move to the next steps through the "Vision to Action" program (http://rivisionfacilitation.org/vision-to-action-plan/
- ✓ Ask the Club Secretary, Membership Chair or Attendance Chair to give you (and New Member Chair) a heads-up about people who missed a number of meetings in the prior month or those whose attendance/engagement has fallen below 50%. *This gives you an opportunity to reach out to members who have been missing meetings*. Suggest you do this regularly.

September – Basic Education and Literacy Month

- ✓ Plan and conduct the monthly board meeting.
- ✓ How are your Club meetings going? Making sure your programs are interesting will keep your attendance up and members happy! Are they exploring worthwhile business topics? How about a quarterly Club member evaluation of speakers? If members are bringing guests, it is a good sign that your meetings are

fun and your Club programs interesting. No guests? Take a hard look at your meetings to see if improvement is needed.

- ✓ How is your member engagement? This may be a time when Club members are ready for new activities—school is back in session and fall is in the air. Do you have service projects or social activity planned?
- ✓ Attend and take your Membership Committee and Chair to the District-sponsored membership training in Zone 27 and Zone 28.
- ✓ If your Club gives scholarships, hold a ceremony to award the scholarships before the students leave for college or community college. *(Good opportunity for press coverage!).*
- ✓ Organize a networking event in which Club members can meet other local professionals and introduce them to Rotary. *(Perhaps business owners & professionals?).*
- ✓ Make sure your Club International Services Chair/committee submits applications for Rotary Foundation District Grant proposals to the District. *Note: this timetable & process may vary by District.*
- ✓ Consider a **Rotary Conversation Café:** my Rotary Story. (*This could be a Club Assembly), Tables have 2 rounds passing "talking stick" where each person at table speaks in turn—telling their Rotary Story.*
- ✓ Prepare a quarterly progress report in meeting 2020-21 goals, communicate to your Club. Enter info on Rotary Club Central. *(End of month).*
- ✓ Host inbound summer youth exchange student and their host family at Club meeting. Highlight and promote youth-related activities and programs and celebrate Club success in Interact, Rotaract, RYLA, and Rotary Youth Exchange.
- ✓ Does your Club distribute dictionaries to school children? Is this the month?

October – Economic and Community Development Month

- ✓ Plan and conduct monthly board meeting—you are already into your second quarter. Do you report back to the Club about what happens at the board meetings?
- ✓ Monitor progress in achieving Membership Retention & Recruitment goals.
- ✓ October or November is often when the District holds District Foundation Seminars. If this is the case, promote attendance. *Certainly you, your Club Foundation Chair, and your Club President-elect will want to attend. Do you have any new members who are interested in getting involved in the Foundation?*
- ✓ Hold a 2nd Conversation café: Club service leaders share and discus what they do.
- ✓ Continue Vocational interviews of newer members.
- ✓ Celebrate World Polio Day (October 24) at your Club meeting that same week. *For example: hold a special Club program, members* wear *End Polio Now pins all week and Club members participate in any District activities.*

November - Rotary Foundation Month

Plan and conduct monthly Board meeting.

- ✓ Guided by your Club Bylaws convene a Nominating Committee to select 2024-25 Club President and 2023-24 Board members.
- ✓ Encourage Club members to participate on Polio NID trip.
- ✓ Set the stage for Foundation Annual Fund Giving through programs and stories about Foundation-funded projects. Remind Club of 100% giving goal for *2023-24*.
- ✓ Recognize the Club's Major Donors, Bequest Society Members, Benefactors, Paul Harris Society members, and Paul Harris Fellows with special acknowledgement during Rotary Foundation Month.
- ✓ Schedule a brief Rotary program about planned giving (the benefit of making a gift to the Rotary Foundation beyond a person's lifetime). Members could become benefactors or Bequest Society members. *Have your club Foundation Chair order "Your Rotary Legacy" brochures (330EN) and hand them out at this meeting----to make it easy for members to make a planned gift.* https://shop.rotary.org/your-rotary-legacy-330
- ✓ Ask Rotarians to visit a Rotaract meeting and to consider volunteering as mentors.

Key dates for Club Treasurer or your Club Foundation

- ✓ US Clubs and Foundations must submit 990 Tax Returns to the IRS by Nov 15. File additional forms depending on Club's activities. By Nov 30, submit a Non-Profit Corporation Report if Club is incorporated.

December – Disease Prevention and Treatment Month

- ✓ Plan and conduct the monthly Board meeting.
- ✓ Club members distribute dictionaries to elementary schools.
- ✓ Plan a family friendly Holiday program/ event to include spouses and family of your Club members. Strengthening our Family of Rotary is always a priority with special focus during this month. *Include Rotaractors? Include grandchildren?*
- ✓ Assess the progress of Club projects and provide progress reports for Humanitarian Grants as required by the Rotary Foundation.
- ✓ Hold the annual Club election in early December (no later than 31 December) for the *2024-25* President and new *2024-25* Board members. Hold Club election of Club Foundation officers and Board members *(If your Club has a separate 501(c) 3 foundation)*.
- ✓ Schedule periodic meetings in the year with your Club's *future presidents-elect*. This is a great way to assure continuity of leadership as well as continuity of significant Club project(s). Good idea to include most recent past Club President in these meetings.
- ✓ Attend District Holiday Party/event if such an event occurs in your District.

Planning Guide and Sample Calendar

Key dates for the Club Secretary

- ✓ Secretary to report monthly membership and attendance via DaCdb or ClubRunner no later than 15 days after the last meeting of the month.
- ✓ Secretary to make sure membership is updated online with Rotary International before January 1.
- ✓ Deadline for reporting next year's Club President and Secretary to the District and entering the information into the DaCdb. (By December 31).

January 2022 – Vocational Service Month

- ✓ Plan and conduct monthly Board meeting.
- ✓ Re-energize your Club after the holidays! Start off with a great meeting!
- ✓ Prepare 6-month progress report in meeting *2023-24* goals. Enter info on Rotary Club Central. Remind all committee chairs to "Share Our Success". Ask them to compile information for recognition of your Club members and their great work! Communicate success to the Club.
- ✓ Plan and conduct Club Assembly to review Club: What's going well? What should be changed? How can we be "even better"?
- ✓ Conduct vocation-related activities and programs.
  How can your members share information on their vocations? Suggestions:
  - Create a "yellow pages" so members can do business with each other.
  - Continue Vocational interviews of newer members.
  - Share your creative ideas for promoting Vocational Service with the District Governor.
- ✓ Choose RYLA (Rotary Youth Leadership Awards) attendees. RYLA is a leadership program coordinated by your District. Each year, thousands of young people participate in this program. Young people ages 14–30 are sponsored by Rotary Clubs to attend this training.
- ✓ Any social events for newer members as well as seasoned members? If not, get scheduled for this year.
- ✓ Schedule mid-year visit with District Governor and District Governor-elect and AG. Be sure to include your Club's President-elect.
- ✓ If it is the practice in your District, meet with AG and other area Club Presidents. Look for collaborative opportunities.

Key dates for Club Secretary and/or Treasurer

- ✓ Ensure the Club Invoice has been received by the Secretary and/or Treasurer **and** that the dues have been paid to RI by January 1.
- ✓ Submit District per capita dues.

February – Peace and Conflict Prevention/Resolution Month

- ✓ Plan and conduct the monthly Board meeting.
- ✓ Club's nominated (and funded) students attend RYLA (*dates vary by District*)
- ✓ Promote attendance at the District conference (*Dates & locations vary by District)*. Online registration is open on the District website.
- ✓ Monitor progress in achieving membership engagement & recruitment goals.
- ✓ Promote attendance at the Rotary International Convention. *Perhaps appoint a Rotarian to be the promoter?*
- ✓ PNWPETS–February, 2024 at Doubletree Hotel, SeaTac airport. *Make sure your 2024-25 Club President-elect attends. Help in any manner she/he might want—perhaps in setting initial goals.*

Key dates for Club Secretary-February 1

- ✓ New Officers for next Rotary year sent to Rotary International
- ✓ Information for the Official Directory

March – Water and Sanitation Month

- ✓ Plan and conduct monthly Board meeting.
- ✓ Your Club President-elect will return from PNW PETS energized! Give her/him some time at the podium? How can you use this enthusiasm to help finish out your year?
- ✓ Promote attendance at the District Conference.
- ✓ Conduct literacy related activities and programs.
- ✓ Recognize World Water Day and Club grants & activities to address water issues (March 22). Ask any Club members to speak who are members of WASRAG (Water & Sanitation Rotarian Action Group). Encourage members to join.
- ✓ 3rd Club Conversation Café: Community Service, Vocational Service and Youth service. Hear from those who lead these activities and have table discussions of what members can contribute and their hopes for the future.
- ✓ (Club option) Select an individual Rotarian for the "Rotary Avenues of Service Citation". This award permits a club to Honor a Club member for outstanding efforts in each of the five Avenues of Service: Club, Vocational, Community, International, and youth. https://my.rotary.org/en/learning-reference/learn-topic/awards

- ✓ Also ask your Foundation Chair to keep you AND the Club informed on your Club's annual, restricted and endowment fund giving as well as your Club's Every Rotarian: Every year (EREY) progress. Report progress/success to your Club members.

April – Maternal and Child Health Month

- ✓ Plan and conduct monthly Board meeting.
- ✓ Ask committee chairs and Rotarians to attend the District Assembly/DLTA (*Dates vary by District)*. *Assign a Rotarian to "sign up" attendees---including a special encouragement for newer to attend.*
- ✓ Prepare a quarterly progress report in meeting current year goals; communicate to Club as a "Share Our Success". Enter info on Rotary Club Central.
- ✓ Attend the District Conference. Celebrate with your Club members.
- ✓ Recognize World Malaria Day and Club's grants to address (April 25).
- ✓ Schedule RYLA participants to speak to the Club about their experience(s).
- ✓ Support your PE and team in attending District Training Assembly to prepare for goals of next year.

May- Youth Service Month

- ✓ Plan and conduct monthly Board meeting.
- ✓ Attend District Assembly (District Leadership Training Assembly)
- ✓ Hold college scholarship awards ceremony at a Club meeting.
- ✓ Hold a 4-way test program at your local high school or middle school.
- ✓ 4th Club Conversation Café: International services (including those who lead international hands-on projects). Hear from those who lead these activities. Have table discussions of what members can contribute and how Club members could be more personally involved.
- ✓ Monitor progress in meeting membership engagement & recruitment goals.
- ✓ Include your Club's President-elect (PE) in discussion of how to maintain the culture of engagement among your Rotary Club members. Welcome the PE's new ideas and enthusiasm to build on your success.

June - Rotary Fellowships Month

- ✓ Report your Club's performance in meeting the current year's Presidential Citation goals. This information is required to be entered **online by you** on **Rotary club Central** by June 30, 2024.

https://my.rotary.org/en/news-media/office-president/presidential-citation-rotary-clubs for more information about reporting.

- ✓ Review YTD Monthly Contribution Report (MCR) to determine your Club's success in meeting its Foundation giving goals (including 100% participation in giving to the Annual Fund). Ensure all contributions are sent in by 15 June to be credited in the current Rotary year. *Your Club Foundation chair is key in getting this done.*
- ✓ Recognize and thank donors for their support for The Rotary Foundation.
- ✓ Arrange for a joint meeting of the incoming and outgoing Boards to ensure continuity.
- ✓ Confer with the President-elect to ensure a smooth transition. Support her/him in planning, goal setting, and selecting their team.
- ✓ Assure that your Club Foundation Chair and/or Club Treasurer submit final Rotary year contributions to The Rotary Foundation before 30 June.
- ✓ Monitor membership development initiatives and goals. Provide the Club with a final report on membership growth & retention, and progress in meeting other goals (increased membership of younger businesspeople and women, for example). Identify areas requiring continued action.
- ✓ Celebrate your Club and Rotarians achievements in the past Rotary year. Remind them of the good they have done.
- ✓ Schedule any special event your club holds to acknowledge the success of the 2023-24 Club President. Pass the baton to the President-elect and take a moment to enjoy the knowledge that your Club had a great year. Plan a dignified ceremony for the installation of next year's Club officers.

Key dates for Club Secretary

- ✓ Before July 1, update year-end Club membership on DaCdb or Club Runner and online with Rotary International.
- ✓ The Club Secretary updates year end Club membership on DaCdb or Club Runner and online with RI before July 1.

Have a GREAT LAST MEETING. You started with a BANG: now end with a BANG.

CELEBRATE! You've completed your year as Rotary Club President.

EXPAND OUR REACH

SESSION DESCRIPTION

If more people affiliate with Rotary — not just as members but also as participants and partners — we'll grow our capacity to make an impact. "Expanding Our Reach" focuses on how we can share our values with new audiences, create new ways to bring people together to experience the power of Rotary, and prove we are an organization that's inclusive, engaging, compassionate, and ambitious on behalf of the world.

ROTARY'S ACTION PLAN:

As People of Action, we understand that **fulfilling our vision requires a plan**.

More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—

and shares the vision of a better world.

This is Rotary's Action Plan through 2024: **to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.**

WHAT DOES "EXPAND OUR REACH" MEAN?

If more people affiliate with Rotary — not just as members but also as participants and partners — we'll grow our capacity to make an impact. This priority focuses on how we can share our values with new audiences, create new ways to bring people together to experience the power of Rotary, and prove we are an organization that's inclusive, engaging, compassionate, and ambitious on behalf of the world.

EXPAND OUR REACH

HOW CAN MY CLUB EXPAND OUR REACH?

- By partnering with other organizations in your community.
- By looking beyond your normal partners like schools, not-for-profits, and other service organizations into all kinds of organizations like book clubs, arts organizations, and cultural or ethnic organizations
- By reaching out further into the community than you now do by addressing community priorities and changing lives
- By using the Rotary Foundation to help fund projects across the world

Consider our campaign to eradicate Polio. It started as a project with one club in the Philippines. Then it attracted the cooperation of other clubs, then of Rotary International, then the World Health Organization, then governments around the world and then the Bill and Melinda Gates Foundation. Our End Polio campaign exposed other organizations to our values and goals and the way we operate our Foundation attracted all of them to partner with Rotary and to provide matching funds to help us fight to eradicate this disease. If Rotary could do this on an international level, can't our clubs do it on a local level?

EXPAND OUR REACH

HOW WILL EXPANDING OUR REACH HELP MY CLUB?

- Membership Growth
- Be of Greater Service
- More Partnerships
- Enhanced Member Experience, Greater Retention
- Expand our Area of Influence
- A More Vibrant Club
- More Hands, More Hearts allow us to do more work
- Greater Engagement of Members leads to a more Vibrant Club providing better member experience and fulfillment

LINK TO CLASS POWERPOINT SLIDES: EXPAND OUR REACH

People around the world know about Rotary. In fact, when we surveyed people in 15 countries, we found that of the world's leading social service organizations, we're among the top three in terms of awareness. But only 35% of respondents saw Rotary as an organization for people like them. And just 25% of people surveyed said they knew someone in Rotary. If we want Rotary to prepare the next generation to lead, we need to make sure they feel welcome and at home here — and that means diversifying both our leadership and our approach. We need to start by looking at all the ways we're engaging with our communities, and by opening up new channels into Rotary for people from all backgrounds.

SHARE OUR ROTARY VALUES WITH OTHERS!

EXPAND OUR REACH

There are many ways people connect. Look around your community and think about who the other leaders are — keeping in mind that there are many different ways to be a leader. How can you start a dialogue with them? Reach out to people who are connecting to others through shared interests — whether it's through book clubs, arts organizations, or groups that celebrate different ethnic or cultural identities. Keep working with your longstanding partners like schools and the local chamber of commerce, but also look for other organizations and networks you can tap into and collaborate with. Hold more family-friendly events. This conveys a powerful message about Rotary's openness as an organization and allows more members of your community to participate. And remember to regularly update your club's website and social media pages so people know all the great things your club is doing in the community. We've spent over a century leading one another to a great purpose. Let's build connections and opportunities that will allow people who share our drive to do the same.

YOUR IDEA BOOK

REFER BACK TO YOUR IDEA BOOK FROM PETS.

HOW CAN YOU IMPLEMENT AT LEAST ONE OF THE IDEAS ABOUT EXPANDING OUR REACH THAT YOU WROTE DOWN?

WHAT WILL BE MOST BENEFICIAL TO YOUR CLUB?

Rotary

INCREASE OUR ABILITY TO ADAPT

COURSE DESCRIPTION

People of action are inventive, entrepreneurial, and resilient. We know what we stand for and why it matters. We're driven by a sense of optimism — a belief that we are and will continue to be essential to our communities, to the world, and to humanity.

ROTARY'S ACTION PLAN

As People of Action, we understand that **fulfilling our vision requires a plan**.

More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—

and shares the vision of a better world.

This is Rotary's Action Plan through 2024: **to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.**

WHAT DO WE MEAN BY INCREASING OUR ABILITY TO ADAPT?

As Rotary Clubs, we need to look at how we can adapt more quickly to a changing world, how new perspectives can strengthen our clubs, and what new ideas could create lasting change. We need to seek out fresh opportunities, create more paths to leadership, open our conversations to diverse voices, and simplify how we operate. By using our collective imaginations to bring new ideas to the fore, we'll create a strong foundation for innovation, sustainability, and growth.

INCREASE OUR ABILITY TO ADAPT

WHY WE ADAPT

Rotary has shown throughout our history that we excel at finding new ways to lead the world to lasting change. This priority builds on that strength. We need to look at how we can adapt more quickly to a changing world, how new perspectives can strengthen Rotary, and what new ideas will create lasting change. We're ready to seek out fresh opportunities, create more paths to leadership, open our conversations to diverse voices, and simplify how we operate. You can work to create a culture of research, innovation, and willingness to take risks in your club to better serve your membership and community.

We all want a stronger, more effective Rotary — a Rotary that's more inclusive and open to fresh faces and fresh ideas. New approaches to our organizing principles won't threaten our sense of who we are. Let's stay true to ourselves and stay ahead of change in our next 117 years.

LINK TO CLASS POWERPOINT SLIDES: INCREASE OUR ABILITY TO ADAPT

YOUR CLUB'S TRADITIONS: Are they still relevant??

INCREASE OUR ABILITY TO ADAPT

You can work to create a culture of research, innovation, and willingness to take risks in your club to better serve your community. But you don't need to do everything at once. Set a series of smaller goals so you can monitor progress and iterate as you go. Some of these goals could be:

- Create your club's version of a venture capital fund. Use it to try out activities or ideas that are different from what you've done before and open up your club to new audiences.
- Host club meetings in a new location and at a new time — even if it's just once a month. Or occasionally replace your meetings with a social event or service project.
- Evaluate all the positions in your club's governance: Can you reduce or combine roles? Does your leadership represent the many perspectives in your community?
- Involve nonmember advisers in club board meetings to gain new and different perspectives.

IDEA BOOK

REFER BACK TO YOUR IDEA BOOK FROM PETS.

HOW CAN YOU IMPLEMENT AT LEAST ONE OF THE IDEAS ABOUT INCREASING OUR ABILITY TO ADAPT THAT YOU WROTE DOWN?

WHAT WILL BE MOST BENEFICIAL TO YOUR CLUB?

ENHANCE PARTICIPANT ENGAGEMENT

SESSION DESCRIPTION

This Priority focuses on the opportunity to show people what Rotary can do for them as individuals and as members of our communities. Enhancing participant engagement means that whenever someone engages with Rotary — through a club, a program, or even an event — they have an experience that exceeds their expectations. It also means that once someone is on the Rotary path, it's as exciting, fulfilling, and meaningful in decade five as on day one.

ROTARY'S ACTION PLAN:

As People of Action, we understand that **fulfilling our vision requires a plan**.

More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—

and shares the vision of a better world.

This is Rotary's Action Plan through 2024: **to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.**

WHAT DOES "ENHANCE PARTICIPANT ENGAGEMENT" MEAN?

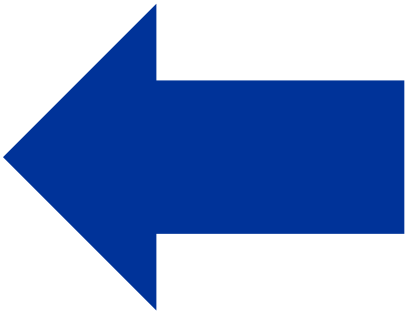
Every encounter is an opportunity to show people what Rotary can do for them as individuals and as members of our communities. Enhancing participant engagement means that whenever someone engages with Rotary — through a club, a program, or even an event — they have an experience that exceeds their expectations. It also means that once someone is on the Rotary path, it's as exciting, fulfilling, and meaningful in decade five as on day one.

ENHANCE PARTICIPANT ENGAGEMENT

WHY IS IT IMPORTANT TO ENHANCE PARTICIPANT ENGAGEMENT?

When participants don't find experiences that feel personally and professionally relevant, they go elsewhere. We know this is one reason Rotary membership has been stagnant. Enhancing participant engagement is assessing what we offer and looking for ways to create additional value. It's taking a hard look at some of our current programs and deciding whether they truly provide value and fulfillment. It's creating new programs, events, learning opportunities, and more that attract new people of action and leaders into our clubs and programs — and give them a reason to stay.

WHAT CAN YOUR CLUB DO TO REENGAGE MEMBERS WHO SEEM TO HAVE LOST INTEREST IN THE CLUB AND NO LONGER PARTICIPATE?



IS YOUR CLUB MEETING THE NEEDS OF ITS ESTABLISHED MEMBERS?

IS YOUR CLUB FINDING OUT THE EXPECTATIONS OF NEW MEMBERS AND MEETING THEIR NEEDS?

ENHANCE PARTICIPANT ENGAGEMENT

HOW CAN YOU TAKE ACTION?

- Seek feedback. Invite participants and the public at large to propose new ideas and share their thoughts on the club experience and projects. This will help you identify gaps between what your club is like now and what it needs to be.
- You could also conduct a club "health check" to identify your strengths and weaknesses or ask new members what is most important to them in a club. Incorporate a participant-centered approach to your club operation. Consistently ask your participants how they want to be engaged and find ways to deliver those opportunities.
- Consider all your participants when setting your goals and strategies as a club: family members, Rotaractors, Interactors, alumni, and others who participate in your service projects or events.
- Get people off the sidelines. Whether you're offering new opportunities for personal and professional connection or providing leadership development and skills training, find new ways to include everyone who interacts with your club.
- By providing the opportunity to serve together and connect, we can deliver a more satisfying experience with Rotary.

LINK TO THE CLASS POWERPOINT SLIDES: ENHANCE PARTICIPANT ENGAGEMENT

HOW CAN YOU ENGAGE THE COMMUNITY IN YOUR CLUB?

ENHANCE PARTICIPANT ENGAGEMENT

YOUR IDEA BOOK

REFER BACK TO YOUR IDEA BOOK FROM PETS.

HOW CAN YOU IMPLEMENT AT LEAST ONE OF THE IDEAS YOU WROTE DOWN?

WHAT WILL BE MOST BENEFICIAL TO YOUR CLUB?

CREATE HOPE
in the WORLD

INCREASE OUR IMPACT

LINK TO CLASS POWERPOINT SLIDES: INCREASE OUR IMPACT

SESSION DESCRIPTION

We all want our Rotary Club to have an enduring legacy: one of lasting change and lives changed for the better from our members and in our communities and around the world. To this end, we must be thinking about how we can commit to projects that have the most impact. We can draw information from members and the community to discover those needs.

We can also draw from our data-driven experiences fighting polio to create metrics that can be applied in pursuit of our other goals: promoting peace; fighting disease; providing clean water, sanitation, and hygiene; saving mothers and children; supporting education; protecting the environment; growing local economies; and so much more.

Every club, along with all of their members and community partners, can significantly increase impact by gaining a greater sense of focus on community needs and conducting pre- and post-activity evaluations.

ROTARY'S ACTION PLAN:

As People of Action, we understand that **fulfilling our vision requires a plan**.

More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—and shares the vision of a better world.

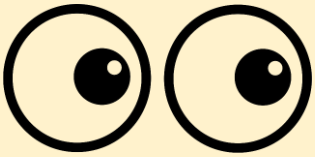
This is Rotary's Action Plan through 2024: **to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.**

INCREASE OUR IMPACT

WHY IS INCREASING OUR IMPACT IMPORTANT?

- Strengthens our Club's Brand in the Community
- Creates a Better World
- Builds Trust
- Helps More People
- Creates Familiarity and Strengthens our Public Image
- Top of Mind Awareness for People Who Get Things Done
- Attracts Potential Partnerships to Leverage our Impact
- Attracts Like-Minded People with a Desire to CONNECT & ACT – and Most Importantly to Get Involved!

This priority focuses on building the practices, infrastructure, and capacity needed to define, measure, track, and analyze data from our service projects in a much more effective way. It also means making sure we're focusing our efforts, attention, and resources in the most meaningful ways.



HAS YOUR CLUB CONSIDERED CONDUCTING A COMMUNITY NEEDS ASSESSMENT?

Check out Rotary's Community Assessment Tools Here

INCREASE OUR IMPACT

MEASURING OUR IMPACT

We know that current and potential partners, younger Rotarians, participants, and increasingly, donors want to see clear, tangible proof of impact. Fortunately, many of us have experience in our professional lives measuring impact against specific objectives. We can also draw from our data-driven experiences fighting polio to create metrics that can be applied in pursuit of our other goals: promoting peace; fighting disease; providing clean water; sanitation and hygiene; saving mothers and children; supporting education; protecting the environment; growing local economies, and so much more

INCREASE OUR IMPACT

TAKING ACTION

- You can significantly increase impact by gaining a greater sense of focus. Try collecting more information on community needs and conducting pre- and post- activity evaluations. This will give you a better sense of where and how you can create measurable, lasting change that will be meaningful to the communities you serve.

- These facts and details will also allow you to tell compelling stories of how your club made a difference. Sharing these stories can help you attract like-minded leaders to our club, form new partnerships, and build a stronger and more diverse network of people to collaborate with on bigger projects.

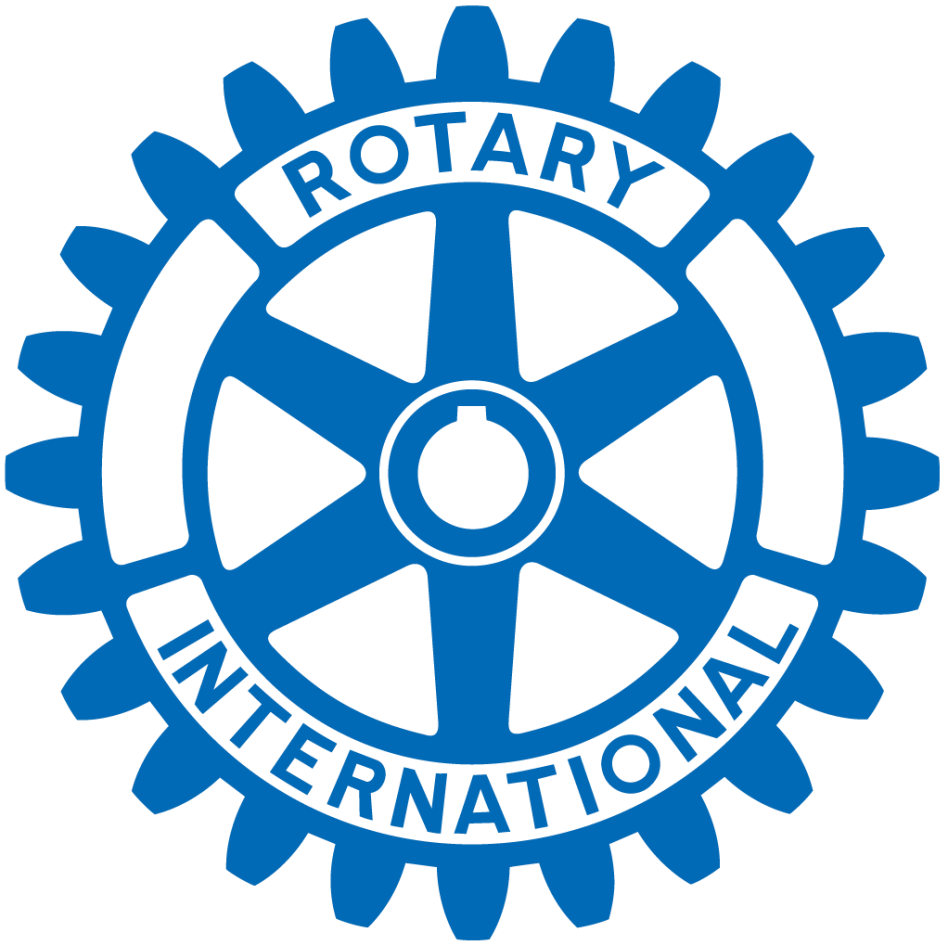
- What will be your club's legacy? The answer starts with defining and measuring the impact you have on your community. Use that information to choose projects that offers the most value and to improve your impact over time.

- Together, we can seek out new ways to translate our expertise into making a difference…..in our communities and across the globe. Let's prove that our impact on the world has only just begun.

REFER BACK TO YOUR IDEA BOOK FROM PETS.

HOW CAN YOU IMPLEMENT AT LEAST ONE OF THE IDEAS ABOUT INCREASING OUR IMPACT THAT YOU WROTE DOWN?

WHAT WILL BE MOST BENEFICIAL TO YOUR CLUB?



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