



District Governor Bio

Bill Biddle

As a Servant Leader I am excited to be your District Governor for Rotary year 2017 – 2018. I have been a member of the Rotary Club of Asheville Breakfast since June 2008. I was President of my club in RY 2012 – 2013. During my tenure, I was privileged to be Group Study Exchange Leader to District 3810, Philippines in February 2010. Since that time I have been to the Philippines six times to participate in Rotary service benefiting indigent Filipino citizens in a variety of projects. Those projects include multiple wheelchair distributions, medical missions, dental hygiene clinics, literacy programs, providing elementary school students with shoes and clothing, purchasing refurbished computers and desks for an elementary and middle school, numerous feeding projects, tuition assistance and providing a teacher of Learning Disabled students with her Masters Degree tuition. I have been involved in serving our district as Polio Plus Chair, Membership Chair, Friendship Exchange and VTT Chair as well as involved in District Governor training since October 2014.

Professionally, I was employed as a digital sales rep in Western NC and Georgia for a total of 31 years. Prior to that, I was in Mental Health while living in Florida for 13 years. Before moving to Florida, I was in the USAF for 6 years, with 4 years 6 months overseas.

I graduated from the University of South Florida with a BA in Psychology and German. In addition, I received my MPA degree with emphasis on Healthcare Management from Golden Gate University, San Francisco, CA. Currently, I am employed at Lowe's in South Asheville.

I have been married to Joanne for 38 years. We have one son who is married.

My passion is service through Rotary. I consider it a privilege to serve.

RY 2017-18 Governor's Club of Excellence Award & District Distinguished Club Citation (aka Pink Pages) (Final, 1 April 2018)

The Rotary Club of _____

President Submitting Report _____ Date _____

This document and RIP Ian H. Riseley's Presidential Citation have two purposes – The first is to offer the Club President another set of criteria to help that club provide the best service to their communities and the world. The second purpose is to recognize achievement among the clubs.

You may take point credit for projects, membership and foundation data IF you are confident you will accomplish those during the Rotary Year 2017-18. Obviously, the Four Way Test applies. Some areas must be completed by the date noted in the item. Beginning membership number is that number in the Rotary database as of 1 July 2017. This document must be in the hands of the District Awards Chair NLT 1 April 2018 to allow time for award presentations at the All Clubs Conference in Kingsport, TN (27-29 April 2018).

Club can be recognized through these awards;

1. The **"2017-18 RI Presidential Citation"** earned on the basis of criteria determined by the RI President Ian H. Riseley.
2. The **"District Distinguished Club Citation"** requirements are outlined below.
3. The **"Governor's Club of Excellence Award"** presented to one club from the small club category (25 or fewer members), one club from the medium club category (26 to 50 members), one club from the large club category (51 to 75 members) and one club from largest club category (76 or more members). Clubs must meet the criteria for the "District Distinguished Club Citation". Total points will be used to determine the top three clubs in each category. The Awards Committee will rank these clubs based on balance in the service areas, and significant accomplishment in the membership and foundation area.
4. The **Interact and Rotaract Presidential Citations** based on criteria outlined at MyRotary.org. (Encourage your club's Interact and Rotaract Clubs to apply).

District Distinguished Club Citation

To qualify a club must meet the mandatory items, earn the minimum number in each category and earn a minimum of **2000** points of the **7000** points available. Minimums are identified in each service areas (Youth Service, Vocational service, Community Service, International Service) and in Administration, Public Image and Membership, and Foundation areas. The Four Way Test applies.

MANDATORY:

- 1. President (2017-18) attends PETS or a District Governor 17-18 approved Makeup Y / N
- 2. Club Membership increase of net one based on membership number as of 1 Jul 2017 Y /N
- 3. Sponsor or continue a youth program – e.g. Rota Kids, Interact, Rotaract, RYLA, Four Way test, Read2Me Y / N

Administration - Total points available: 1,145 (minimum 500) _____

- 1. *Attended the 2016-17 District Conference in Hickory (President 2016-17, President 2017-18 , Secretary, Treasurer, Officers) 10 points each, members and/or spouses (max 100 points).* _____
- 2. President 2017 -18 registers for International Convention in Toronto, Canada. (40 points). _____
- 3. Club members register for International Convention in Toronto, Canada. (20 points per member, max of 400) _____
- 4. Club elected (and posted in DACdb.com) the President for 2018-19 not later than 31 December 2017. (50 points). _____
- 5. *Identify and report names of Treasurer, Secretary, and Foundation, Membership, and Public Image Committee Chairs (for 2017-18) in update DACdb.com before **1 MAY 2017**. (10 points each; max 50).* _____
- 6. *Creating Your Club Strategic Plan completed 30 June 2017. (50 points)* _____
- 7. *Club Goals for Rotary Year 2017-18 entered in Rotary Club Central (Rotary.org) – e.g. Foundation, Service, Membership, etc by 30 June 2017. (10 points each max of 250 points).* _____
- 8. Attendance Reports received by District Secretary by 15th of each month from July 2017 through March 2018 (5 points each, for each late report subtract (-) 5 points, max: 45 points). _____
- 9. Schedule Club Programs on Rotary Themes (5 points each, max 60 points). Programs may be held in any month – preferred months below:
 - a. June 2017 – Rotary Fellowships (Quilting, Cycling, Travel) <https://www.rotary.org/myrotary/en/rotary-fellowships> _____
 - b. July 2017 – Polio Plus _____
 - c. August 2017 – membership/Extension _____
 - d. September 2017– Basic Education and Literacy _____
 - e. October 2017 – Economic and Community Development _____
 - f. November 2017 – Foundation _____
 - g. December 2017– Disease Prevention and Treatment _____
 - h. January 2018 – Vocational Services _____
 - i. February 2018 – Peace and Conflict Prevention/Resolution _____
 - j. March 2018 – Water and Sanitation _____
 - k. April 2018 – Maternal and Child Health _____
 - l. May 2018 – Youth Services _____

10. Club members serving in District 7670 and/or Zone positions. (100 points per member, 500 maximum).

Total for Administration (500 minimum) _____

Public Image – Total Available Points: 265 (100 minimum)

1. *Create and institute a Public Image plan prior to 1 July 2017 (50 points)* _____
2. *Public Image Chair attends the Club Leadership Seminar May 2017 (25 points)* _____
3. Establish and/or maintain a current Club website (25 points). _____
4. Publish (electronic preferred) Club Bulletin for each meeting (1 July 2017- 31 March 2018) (25 points for printed – 50 points for digital). _____
5. Release at least 5 unique news items about local, district or international Rotary activities to news media. 10 points each, 30 points for international article, max 80 points) _____
6. Submit 2 unique articles and good quality pictures of Rotarians at work for the Governor’s Newsletter or the District Website. (5 points each, Max 10 Points) _____
7. Establish or Maintain a social media site for the club i.e. Facebook, twitter or Youtube (25 points) _____

Total for Public Image (100 minimum) _____

Membership- Total points available: 650 (200 minimum)

1. *Institute a membership plan prior to 1 July 2017 (175 points)* _____
2. *Membership Chair attends Club Leadership Assembly – May 2017 (35 points)* _____
3. Club President 2017-18 personally recruits and inducts a new member prior to March 1, 2018. (50 points) _____
4. New Members Inducted at a formal induction ceremony. (20 points for each member, Max 100) _____
5. Conduct a New Member Orientation new members (40 points) _____
6. Hold a Rotary Rally or similar Membership recruitment effort. (50 points) _____
7. *All club members are included in DACdb.com with current information (email, mailing address, Birthday/Month/Year, phone number and recent picture) as well as Rotary ID# deadline 1 May 2017 (200 points for all)* _____

Total for Membership (200 minimum) _____

Community Service – Total Points Available: 700 (200 minimum)

1. Initiate a new or continue a current Literacy program or project within your community. (50 points) _____
2. Conduct a PolioPlus awareness or fund-raising Project in the community. (50 pts/event; max.100 pts) _____
3. Participate in the C.A.R.T. (Coins for Alzheimer Research and Trust) Fund through club program or community awareness. (50 points) _____
4. Remit to District C.A.R.T. chairman a minimum of \$20 per capita during RY 2017-18. (50 points) _____
5. Organize, continue, or participate in a Hunger-related project in your community. (Examples – Stop Hunger Now, Rotarians Against Hunger, Food Collections) (50 points per project, max of 100 points) _____
6. Initiate or continue a Community Service project. (50 pts each, 150 pts max). _____
7. Initiate or continue a Signature Service Project. (100 points) _____
8. Initiate or continue a Signature Fundraiser. (100 points) _____
9. Log Service hours for RY 2017-2018 on Rotary Club Central. (150 points) _____

Total for Community Service (200 minimum)

Vocational Service, total points available: 600 (100 minimum)

1. Vocational talks by members (10 points each. max: 50 points) _____
2. Vocational talks by program guests (10 points each. max: 50 points) _____
3. Club member presentation on workplace ethical behavior stressing the ‘Four Way Test’. (50 points) _____
4. Sponsor a day for Rotarians to bring young people to their place of business to learn about their occupations (25 points for each young person, max 100) _____
5. Recognize one or more community members who have made outstanding professional achievements while maintaining high ethical standards. Examples include teacher, policeman, medical, principal, business person. (25 points each, max 50 points) _____
6. Establish or continue a “*Four Way Test*” program in local schools. (100 points for each school, max 200 points) _____

Total for Vocational Service (100 Minimum) _____

Foundation - Total points available: 1640 (minimum of 400)

1. Award 20 points for each Rotarian attaining a new Paul Harris Fellow or new multiple Paul Harris Fellow (Max 100 points) _____
2. Club becomes or remains (this means everyone is still a PHF) a 100% Paul Harris Fellow club (100 points) _____
3. Award 100 points for a five % increase of Paul Harris Society Members. (100 points) _____
4. Award 10 points for each Sustaining member award. (max 100 points) _____
5. Club President becomes or remains a sustaining member (minimum of \$100 donation to the Annual Fund). (100 points) _____
6. Award 20 points for each member who becomes a new Benefactor. (max 100 points) _____
7. Award 50 points for each new Major Donor. (Max 150 points). _____
8. Award 30 points for each new Bequest Society member or New Endowment Donor (max 120 points) _____
9. Club meets 100% EREY status by **1 April** 2018. (100 points) _____
10. Club members donate at least \$20 per capita to PolioPlus (50 points). _____
11. Club members, President 2017-18, President 2018-19 and Foundation Chair (or Grants Chair) for 2017-18 attended Grant Management Training seminar (Aug 2017) (20 points/person; max 100) _____
12. ***Club officers for 2017-18 (President, President-Elect, Secretary, Treasurer, Foundation Chair, Membership, and Service Chairs) attend Club Leadership Assembly May 2017 (25 Points each, maximum of 200)*** _____
13. Award 10 points for each club member who attends the District Foundation Banquet (Nov 2017) (max. 100 points) _____

Total for Foundation (400 minimum) _____

International Service - Total Points Available: 700 (100 minimum)

1. Host or nominate members for a Friendship Exchange, Group Study Exchange, or Vocational Training Team (100 points) _____
2. Nominate a Peace or Global Scholar (100 points) _____

- 3. Club members participate in an international project outside the United States) (50 points per member, 100 max) _____
- 4. Club qualifies and applies for a Global Grant Project. (100 points) _____
- 5. Club qualifies and applies for or joins another club applying for a Global Grant. (100 points) _____
- 6. Club initiates, continues, or participates in an international service project (100 pts). _____
- 7. Invite a speaker from a recent international project (100 points) _____

Total for International Service (100 minimum) _____

Youth Service - Total points available 1300 (400 minimum)

- 1. Host an incoming Short or Long Term Youth Exchange student (75 points) _____
- 2. Sponsor an outbound Short or Long Term Youth Exchange student. (50 points) _____
- 3. Sponsor a new or continue a RotaKids Club (50 points per club, 100 max) _____
- 4. Sponsor a new or continue an Interact Club. (50 points per club, 100 max) _____
- 5. Sponsor a new or continue a Rotaract Club (50 points per club, 100 max) _____
- 6. Conduct a Project with an Interact Club (50 points) _____
- 7. Conduct a Project with a Rotaract Club (25 points) _____
- 8. Sponsor student to Rotary Youth Leadership (RYLA) (100 points each; max 200) _____
- 9. Conduct a club program using Interact, Rotaract, or Youth Exchange student (50 points) _____
- 10. Club hosts (participates and pays) a multiple day activity for inbound Youth Exchange Students staying in the District (100 points) _____
- 11. Sponsor a local non-Rotary youth organization such as Scouts, 4H club. (50 pts) _____
- 12. Sponsor a project or continue a project such as Dr Suess Reading Program, Back Pack for children, etc. (100 points) _____

Total for Youth Service (400 Minimum) _____

TOTAL POINTS SUBMITTED _____

SIGNED: _____ (Club President 2017-18)
Date: _____

PLEASE NOTE:

1. The Four Way Test always applies. Please include those activities which may be scheduled but not completed (due to submission timelines) if you intend to accomplish them within the Rotary year.
2. Participating clubs must be current in both District and RI financial obligations to be considered for this award.
3. The form must be completed and forwarded to the District Awards Chair and received no later than **1 April 2018**. Please email to the Rotary Office at ashevillerotary@bellsouth.net or

**Send to: District Awards Chair
Rotary District 7670
PO Box 1954
Asheville, NC 28802**

CLUB PRESIDENT EXPECTATIONS

1. People first! Surround yourself with a team of capable individuals
2. Define Rotary as it should exist in your club today
3. Play by the rules - Update and enforce your club by-laws and constitution
4. Formulate/Review an annual budget and long-range plan
5. Prepare an effective weekly meeting agenda and program
6. Strengthen your club by creating a plan for membership growth
7. Plan effective service projects and fundraisers
8. Support The Rotary Foundation with member contributions
9. Establish an effective public image and awareness campaign
10. Promote attendance at district training opportunities
11. Collaborate with area clubs and utilize your Assistant Governor
12. Make Rotary FUN for you and your club
13. Remember that planning is key, but successful, timely execution is what makes your planning a reality
14. If it is important, you need to communicate multiple times and in multiple formats – verbal, written, and social media
15. Never be afraid to delegate – you can't know or do everything yourself
16. Remember to say "*thank you*" – people value being appreciated

ASSISTANT GOVERNOR EXPECTATIONS

1. Attend the Assistant Governor training session.
2. Attend Pre-PETS with Presidents Elect
3. Attend PETS
4. Assist incoming Club Presidents in goal setting
5. Be digitally competent and prepared to assist Club Presidents in accessing Rotary Club Central and inputting Club goals.
6. Assist Clubs in earning the Rotary International Presidential Citation
7. Assist Clubs in earning the District Governor Award
8. Attend the District Officers Installation
9. Visit Clubs for which you are responsible regularly. Strive for a minimum of one visit each quarter. (One of these visits can be during the Official visit with me.) Be involved in the lives of the Clubs for which you are responsible.
10. Hold joint meetings with Club Presidents and Presidents Elect in your Area, communicate Clubs' requests/concerns to the District Governor, encourage Clubs to follow through on requests and recommendations of the Governor, and facilitate area planning and collaboration between Clubs.
11. Help Clubs plan for the "District Governor Official Club Visit". Attend each such visit with the District Governor.
12. Attend and actively promote attendance at District Events scheduled on the District Calendar.
13. Encourage the submission of District Newsletter items.
14. Participate in District Governor scheduled monthly conference calls, as requested.
15. Provide the District Governor with a brief quarterly status report on each Club that would include Club activities, successes, and challenges.
16. Encourage Clubs to sponsor and send Club Members to Rotary Leadership Institute training to develop future Club and District Leaders.
17. Work effectively with Membership, Foundation, and Public Image Advocates for your Area.

District 7670 Goals RY 2017 – 2018

2017-2018 Overall Goals for Clubs

- At least 30 clubs achieve the Presidential Citation
- At least 30 clubs achieve the District Governor Award

Membership Goals

- Increase District membership by 3% - At Club level, achieve a net gain of one new Rotarian
- Achieve 85% Retention Rate
- Form one or more new Interact clubs
- Form one or more new Rotaract clubs, either Community or College based
- Form one new Rotary club

Foundation Goals

- Increase Paul Harris Fellows by 30 new members
- Increase two new 100% Paul Harris Fellow Clubs
- Increase per capita Annual Program Fund giving to \$100 per Rotarian
- Increase Sustaining Members Club by 20%
- Demonstrate Multi-District cooperation in Global Grants
- Participate in multi-Club area and Global projects
- Participate in an Outbound or Inbound Youth exchange
- Participate in a Vocational Training Team exchange
- Achieve a goal of 100% EREY

Public Image Goals

- Earn the Zone 33 Public Image Award

DISTRICT 7670 2017 - 2018 MOU

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING

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### THE ROTARY FOUNDATION

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report On Use Of Grant Funds
6. Document Retention
7. Reporting Misuse Of Grant Funds

#### Club Qualification

To participate in Rotary Foundation global and packaged grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

- A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
- C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
- D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
- E. The club must cooperate with any financial, grant, or operational audits.

#### Club Officer Responsibilities

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:

- A. Appointing at least one club member to implement, manage, and maintain club qualification
- B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
- C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

#### Financial Management Plan

The club must have a written financial management plan to provide consistent administration of grant funds. The financial management plan must include procedures to

- A. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
- B. Disburse grant funds, as appropriate
- C. Maintain segregation of duties for handling funds
- D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
- E. Ensure that all grant activities, including the conversion of funds, comply with local law

#### Bank Account Requirements

In order to receive funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must
  - 1. Have a minimum of two Rotarian signatories from the club for disbursements
  - 2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

#### Report on Use of Grant Funds

The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

#### Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- A. Documents that must be maintained include, but are not limited to:

- 1. Bank information, including copies of past statements
  - 2. Club qualification documents including a copy of the signed club MOU
  - 3. Documented plans and procedures, including:
    - a. Financial management plan
    - b. Procedure for storing documents and archives
    - c. Succession plan for bank account signatories and retention of information and documentation
  - 4. Information related to grants, including receipts and invoices for all purchases
- B. Club records must be accessible and available to Rotarians in the club and at the request of the district.
- C. Documents must be maintained for a minimum of five years, or longer if required by local law.

**Reporting Misuse of Grant Funds**

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

**Authorization and Agreement**

This memorandum of understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.

On behalf of the Rotary Club of \_\_\_\_\_, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year \_\_\_\_\_ and will notify Rotary International District \_\_\_\_\_ of any changes or revisions to club policies and procedures related to these requirements

**Club President**

**Term** \_\_\_\_\_

**Name** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

**Club President-Elect.**

**Term** \_\_\_\_\_

**Name** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

"The Rotary Foundation - Recognition Made Simple"

**\$100<sup>+</sup>**

**Sustaining Member**

Every year I give \$100 or more to  
The Annual Programs Fund of  
The Rotary Foundation



**Paul Harris Fellow**  
I've now given a total of  
\$1,000  
to The Annual Programs Fund



**Multiple Paul Harris Fellow**  
I've now given  
\$2,000....\$3000..., etc  
to The Annual Programs Fund



**Paul Harris Society**  
I commit to giving  
\$1,000 Every Year  
to The Annual Programs Fund



**Major Donor**  
I have given a total of \$10,000<sup>+</sup>  
to The Rotary Foundation



**Arch Klumph Society**  
I have given a total of \$250,000<sup>+</sup>  
to The Rotary Foundation



**Benefactor**  
In my estate plans,  
or in cash I give \$1,000<sup>+</sup>  
to The Endowment Fund



**Bequest Society**  
In my estate plans,  
I give \$10,000<sup>+</sup>  
to The Endowment Fund

**ROTARY INTERNATIONAL DISTRICT 7670  
DISTRICT LEADERSHIP & COMMITTEE CHAIRS 2017-18**

|                                         |                                 |
|-----------------------------------------|---------------------------------|
| District Governor                       | Bill Biddle                     |
| District Governor-Elect                 | Isaac Owolabi                   |
| District Governor-Nominee               | Tiffany Ervin                   |
| DGN-D                                   | To Be Selected In October, 2017 |
| Immediate Past District Governor        | Gary Dills                      |
| District Secretary                      | Margaret Gormley-Chapman        |
| District Treasurer                      | Toby Allman                     |
| District Trainer                        | Jack McCaskill                  |
| District Finance Chair                  | Milt Stork                      |
| District Information Technology Systems | – Vacant currently              |

**ASSISTANT GOVERNORS**

|                                   |                                                                                                                     |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------|
| Area I – Sean Gibson              | Murphy, Clay County, Franklin, Franklin Daybreak                                                                    |
| Area II - Kenneth Nicholson       | Highlands, Cashiers Valley, Highlands-Mountaintop, Sylva                                                            |
| Area III – Peggy Wike             | Waynesville-Sunrise, Bryson City, Haywood County (Canton), Waynesville                                              |
| Area IV - Tiffany Ervin           | Brevard, Rutherford County                                                                                          |
| Area V – Marvin Baldwin           | Asheville-Biltmore, Arden, Asheville, Asheville-South, Asheville-Metro                                              |
| Area VI – Bill Haggard            | Asheville Breakfast, Hendersonville, Black Mountain, Asheville-West                                                 |
| Area VII - David Waechter         | Blowing Rock, Boone                                                                                                 |
| Area VIII – Ed Neff               | Avery County, Spruce Pine                                                                                           |
| Area IX - Jason Herman            | Hickory, Catawba Valley (Conover), Newton-Conover, Lake Hickory, (Hickory), Hickory Sunrise, Sherrills Ford-Terrell |
| Area X - Joshua Strickland        | Lincolnton, Lincolnton-Sunrise, Denver/Lake Norman                                                                  |
| Area XI – Rosa Ivey               | Boone Sunrise, Caldwell County, Lenoir, Granite Falls                                                               |
| Area XII – Bob Rinehart Sr.       | Morganton, Valdese, Marion, Burke-Sunrise, McDowell County                                                          |
| Area XIII - Michael Stevenson     | Madison County, Burnsville                                                                                          |
| Area XIV – Cheryl Gudger-Thompson | Hendersonville, Hendersonville Four Seasons, Hendersonville Four Seasons Sat, Pisgah Forest, Tryon                  |

**FOUNDATION** PDG Carol King, Chair (3rd year of three year term)

PolioPlus- TBD Assisted by O'Neil Shelton  
CART – PDG Dennis Sanders  
Annual Fund – Jennifer Dirkes and Ron Winecoff  
PHS – PDG Billi Black  
Grants – Global Grants-Jose Castro  
District Grants- Mary Otto Selzer  
Global Scholars & Peace Fellowship – Ted Carothers  
Audit & Stewardship – Nancy Brooks



## **INTERNATIONAL SERVICE CHAIR**

PDG Frank Dean

## **PUBLIC IMAGE**

PDG Billi Black Chair

DGN Tiffany Ervin- CoChair and Social Media

Joan Van Orman - Marketing

## **YOUTH**

Regina Hartley, Chair

Youth Exchange-Bill Biggers, Chair

ROTA Kids- Larry Hollifield

Outbound Chair-Bill Christy

Inbound Chairs-Fatma May & Tom Rightmyer

Short-Term Exchange Chair-Bill Bauman

Country Contact- Fred Reidinger

Public Relations-Tara Jaynes

Interact Chairs-Glenn Barger, Chair; Larry Hollifield and John Short – Western Chairs

Rotaract Chairs- Lori Tyler, Chair; Larry Hollifield and John Short – Western Chairs

Youth Protection Officer- Paul Hoffman

## **MEMBERSHIP**

John Yermack, DMC

## **DISTRICT CONFERENCE**

Cindy Ireland, Chair

## **AWARDS**

PDG Dennis Sanders and PDG David Burrell

## **ROTARY INTERNATIONAL CONVENTION**

PDG Bob Miller, PDG Jim Efland

## **FRIENDSHIP EXCHANGE**

Charles Wolfe

## **RLI LIAISON**

Vacant

## **NOMINATING COMMITTEE**

IPDG Gary Dills

PDGs: Billi Black, Ronnie Thompson, Frank Dean, Bill Parker, Ed Walcoff, Carol King  
(tentative PDGs)

Six immediate past club presidents (to be chosen by Chair Gary Dilla)

## **STRATEGIC PLANNING**

Mike Norris, Chair

## **ZONE FUNCTIONS**

PDG Jim Efland

## **DISTRICT COUNCIL**

1. DG Bill Biddle
2. DGE Isaac Owolabi
3. DGN Tiffany Ervin
4. DGND *when selected*
5. IPDG Gary Dills
6. District Foundation Chair – Carol King
7. District Membership Chair – John Yermack
8. District Finance Chair – Milt Stork
9. District Public Image Chair – PDG Billi Black and DGN Tiffany Ervin
10. District Youth Services Chair – Regina Hartley
11. District Trainer – Jack McCaskill
12. International Service Chair - PDG Frank Dean
13. Two Past District Governors (selected by DG Biddle)  
Jim Efland  
Chuck Reiley
14. One current club president (2017-18) selected by DG Bill Biddle  
Richard Johannes
15. Two Current Assistant Governors selected by DGE Isaac Owolabi  
Ken Nicholson  
Jason Herman

## **FINANCE COMMITTEE**

1. Milt Stork (appointed by Bill Biddle as DGE)
2. DG Bill Biddle
3. DGE Isaac Owolabi
4. DGN Tiffany Ervin
5. IPDG Gary Dills
6. Three members at large
  1. Nancy Brooks, 3rd year appt by Bill Biddle
  2. Peggy Wike – 3<sup>rd</sup> year, appointed by DGN Gary Dills and is completing the term of the original appointee, Bob Soderstrom
  3. Len Jones -2nd year- appointed by DGN Isaac Owolabi
7. Non-Voting, Ex-officio Members
  1. DGND – when selected
  2. District Secretary Margaret Gormley-Chapman
  3. District Treasure Toby Allman

3/6/2017



## **District 7670 PETS 2017**

# **The How and Why of Strategic Planning**

**“As club presidents, you are the most important officers in all of Rotary”**

John Hewko

# The Why and How of Strategic Planning

## Introduction

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**“Presidents must realize that the days of ‘projects for my year’ are a thing of the past, and the most successful clubs plan multiyear, sustainable plan.”**

Michael Levitt

### Learning Objectives:

1. Develop reasons why a Strategic Plan is in the best interest of the club.
2. Understand how to apply the Strategic Planning Model to your club.
3. Identify resources available to support planning and leadership development efforts.
4. Complete elements of an initial draft of the four parts of the strategic planning process.

### Key Points to Consider:

1. Obtain buy-in that development of a 3-year plan is in the best interest of the club.
2. Involve past, current, and incoming officers.
3. Include a wide variety of perspectives by involving the full club or a diverse representation of you club’s membership.
4. Consider all ideas.
5. Have the completed plan signed by the president, president-elect, and president nominee.
6. Brief the plan to club members at the June club assembly.
7. Communicate the status of club goals and activities each quarter.
8. Ensure committee plans and goals support the strategic plan.
9. Be prepared to revisit the plan each year and adjust priorities and goals as needed.
10. Publish the plan priorities and goals on the club website and social networking sites.

**“We need to focus on projects that can grow over time, with our members, and that consequently allow us to increase our impact”. We need to keep pace with the changing world and the changing demands and expectations of prospective Rotarians.”**

Holly Ransom

# Developing the Plan

---

## 1. Determine Reality: Where are we now?

- a. Develop a list of your club strengths and weaknesses

| Strengths                                                             | Weaknesses                                                            |
|-----------------------------------------------------------------------|-----------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> | <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |

- b. Identify the challenges facing the community.

| Challenges                                                            |
|-----------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |

## 2. Where do we want to be?

- a. Develop a comprehensive list of ideas, in priority, to be accomplished over the next three years.
- c. Develop a vision statement that communicates the future of you club. How is you club unique in the community?

### To be recognized

By whom \_\_\_\_\_

As what \_\_\_\_\_

Doing what \_\_\_\_\_

To accomplish what \_\_\_\_\_

**To be recognized** [my members, Rotary, the community] **As a vibrant club** [inspired, passionate, dynamic, influential, respected, diverse membership, all vocations] **Working together** [financial, time, engaged] **To make a lasting impact on the lives of others** [children community, internationally]

# Developing the Plan

---

## 3. How do we get there?

- a. Decide on the three to five strategic priorities that will have the greatest impact as you club works toward the vision.
- b. Identify the annual goals that support each of the priorities.
- c. Determine the timeline, resources and people needed to accomplish each goal.

Strategic Priority #1 \_\_\_\_\_

| Annual Goal | Timeline | Resources | Members Assigned |
|-------------|----------|-----------|------------------|
| a.          |          |           |                  |
| b.          |          |           |                  |
| c.          |          |           |                  |

Strategic Priority #2 \_\_\_\_\_

| Annual Goal | Timeline | Resources | Members Assigned |
|-------------|----------|-----------|------------------|
| a.          |          |           |                  |
| b.          |          |           |                  |
| c.          |          |           |                  |

Strategic Priority #3 \_\_\_\_\_

| Annual Goal | Timeline | Resources | Members Assigned |
|-------------|----------|-----------|------------------|
| a.          |          |           |                  |
| b.          |          |           |                  |
| c.          |          |           |                  |

## 4. Follow-up and feedback: How are we doing?

- a. How will you monitor progress? \_\_\_\_\_
- b. When will you provide feedback? \_\_\_\_\_
- c. To whom will you provide feedback? \_\_\_\_\_

# Example Strategic Plan

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## Rotary Club of Anytown Strategic Plan 2016-2019

### Club Strengths

- Members have meaningful, long-lasting friendships
- Strong history of service in local community
- High quality meeting location and meals
- Support of Interact and Rotaract programs
- Growing number of women members

### Club Weaknesses

- Declining membership
- Less than 10% of members are under 50 years old
- Lack of engagement with hands-on service projects
- Lack of social/networking programs
- Inconsistent support to TRF/EREY
- Lack of signature community fund raising event

### Challenges Facing the Community as a result of needs analysis:

- Rate of unemployment/under-employed
- 7,742 children identified as food insecure
- Decline in government funds to public agencies
- Decline of families with medical coverage
- Growing population of elderly requiring home care
- 39K families needing assistance

### Vision

*Be Recognized as a Vibrant Club Working Together  
To Make a Lasting Impact on the Lives of Others*

### Strategic Priority #1: Increase and retain membership from 32 to 50

|           |                           |
|-----------|---------------------------|
| 2017-2018 | Increase membership to 40 |
| 2018-2019 | Increase membership to 45 |
| 2019-2020 | Increase membership to 50 |

### Strategic Priority #2: Commit to long-term support of a signature community service project.

|           |                                                                        |
|-----------|------------------------------------------------------------------------|
| 2017-2018 | Increase fundraising to support 15,000 meals for Backpack for Children |
| 2018-2019 | Increase fundraising to support 20,000 meals for Backpack for Children |
| 2019-2020 | Increase fundraising to support 25,000 meals for Backpack for Children |

### Strategic Priority #3: Celebrate RI Presidential Citation and District Governor Club of Excellence Award

|           |                                     |
|-----------|-------------------------------------|
| 2017-2018 | Complete requirements March 1, 2018 |
| 2018-2019 | Complete requirements March 1, 2019 |
| 2019-2020 | Complete requirements March 1, 2020 |

### Signatures:

President John Jones \_\_\_\_\_

President-elect Mandy Moore \_\_\_\_\_

President nominee Bradley Bunch \_\_\_\_\_

## Rotary Club of Anytown Annual Survey 2017-18

1. I enjoy Rotary because \_\_\_\_\_

2. Rate the following aspects of our club:

|                                                    | Excellent |   | Adequate |   | Insufficient |
|----------------------------------------------------|-----------|---|----------|---|--------------|
| a. Time management of weekly meeting .....         | 5         | 4 | 3        | 2 | 1            |
| b. Time for fellowship .....                       | 5         | 4 | 3        | 2 | 1            |
| c. Networking events .....                         | 5         | 4 | 3        | 2 | 1            |
| d. Quality of speakers .....                       | 5         | 4 | 3        | 2 | 1            |
| e. Variety of program topics .....                 | 5         | 4 | 3        | 2 | 1            |
| f. Club dues .....                                 | 5         | 4 | 3        | 2 | 1            |
| g. Quality and focus of local service projects ... | 5         | 4 | 3        | 2 | 1            |
| h. International service projects .....            | 5         | 4 | 3        | 2 | 1            |
| i. Club website/Facebook pages.....                | 5         | 4 | 3        | 2 | 1            |
| j. Member involvement in club activities .....     | 5         | 4 | 3        | 2 | 1            |
| k. The club bulletin                               | 5         | 4 | 3        | 2 | 1            |

3. Yes No Will you work to sponsor a new member into the club this year?
4. Yes No Will you volunteer to be a mentor for a new member?
5. Yes No Will you contribute to The Rotary Foundation so that we become an 'Every Rotarian Every Year' and Sustaining Member club and qualify for a district grant? [Everyone give something and we average \$100 per member]
6. Yes No Will you volunteer to support the signature fundraising event?
7. Yes No Will you contribute \$30. to support Polio +.
8. Yes No Will you contribute \$20. To support The C.A.R.T Fund for Alzheimer Research?
9. Yes No Will you volunteer to serve on a club committee?

**Please turn the page over**





**ROTARY INTERNATIONAL DISTRICT 7670  
DISTRICT LEADERSHIP & COMMITTEE CHAIRS 2017-18**

|                                         |                                 |
|-----------------------------------------|---------------------------------|
| District Governor                       | Bill Biddle                     |
| District Governor-Elect                 | Isaac Owolabi                   |
| District Governor-Nominee               | Tiffany Ervin                   |
| DGN-D                                   | To Be Selected In October, 2017 |
| Immediate Past District Governor        | Gary Dills                      |
| District Secretary                      | Margaret Gormley-Chapman        |
| District Treasurer                      | Toby Allman                     |
| District Trainer                        | Jack McCaskill                  |
| District Finance Chair                  | Milt Stork                      |
| District Information Technology Systems | – Vacant currently              |

**ASSISTANT GOVERNORS**

|                                   |                                                                                                                     |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------|
| Area I – Sean Gibson              | Murphy, Clay County, Franklin, Franklin Daybreak                                                                    |
| Area II - Kenneth Nicholson       | Highlands, Cashiers Valley, Highlands-Mountaintop, Sylva                                                            |
| Area III – Peggy Wike             | Waynesville-Sunrise, Bryson City, Haywood County (Canton), Waynesville                                              |
| Area IV - Tiffany Ervin           | Brevard, Rutherford County                                                                                          |
| Area V – Marvin Baldwin           | Asheville-Biltmore, Arden, Asheville, Asheville-South, Asheville-Metro                                              |
| Area VI – Bill Haggard            | Asheville Breakfast, Hendersonville, Black Mountain, Asheville-West                                                 |
| Area VII - David Waechter         | Blowing Rock, Boone                                                                                                 |
| Area VIII – Ed Neff               | Avery County, Spruce Pine                                                                                           |
| Area IX - Jason Herman            | Hickory, Catawba Valley (Conover), Newton-Conover, Lake Hickory, (Hickory), Hickory Sunrise, Sherrills Ford-Terrell |
| Area X - Joshua Strickland        | Lincolnton, Lincolnton-Sunrise, Denver/Lake Norman                                                                  |
| Area XI – Rosa Ivey               | Boone Sunrise, Caldwell County, Lenoir, Granite Falls                                                               |
| Area XII – Bob Rinehart Sr.       | Morganton, Valdese, Marion, Burke-Sunrise, McDowell County                                                          |
| Area XIII - Michael Stevenson     | Madison County, Burnsville                                                                                          |
| Area XIV – Cheryl Gudger-Thompson | Hendersonville, Hendersonville Four Seasons, Hendersonville Four Seasons Sat, Pisgah Forest, Tryon                  |

**FOUNDATION** PDG Carol King, Chair (3rd year of three year term)

PolioPlus- TBD Assisted by O'Neil Shelton  
CART – PDG Dennis Sanders  
Annual Fund – Jennifer Dirkes and Ron Winecoff  
PHS – PDG Billi Black  
Grants – Global Grants-Jose Castro  
District Grants- Mary Otto Selzer  
Global Scholars & Peace Fellowship – Ted Carothers  
Audit & Stewardship – Nancy Brooks

## **INTERNATIONAL SERVICE CHAIR**

PDG Frank Dean

## **PUBLIC IMAGE**

PDG Billi Black Chair

DGN Tiffany Ervin- CoChair and Social Media

Joan Van Orman - Marketing

## **YOUTH**

Regina Hartley, Chair

Youth Exchange-Bill Biggers, Chair

ROTA Kids- Larry Hollifield

Outbound Chair-Bill Christy

Inbound Chairs-Fatma May & Tom Rightmyer

Short-Term Exchange Chair-Bill Bauman

Country Contact- Fred Reidinger

Public Relations-Tara Jaynes

Interact Chairs-Glenn Barger, Chair; Larry Hollifield and John Short – Western Chairs

Rotaract Chairs- Lori Tyler, Chair; Larry Hollifield and John Short – Western Chairs

Youth Protection Officer- Paul Hoffman

## **MEMBERSHIP**

John Yermack, DMC

## **DISTRICT CONFERENCE**

Cindy Ireland, Chair

## **AWARDS**

PDG Dennis Sanders and PDG David Burrell

## **ROTARY INTERNATIONAL CONVENTION**

PDG Bob Miller, PDG Jim Efland

## **FRIENDSHIP EXCHANGE**

Charles Wolfe

## **RLI LIAISON**

Vacant

## **NOMINATING COMMITTEE**

IPDG Gary Dills

PDGs: Billi Black, Ronnie Thompson, Frank Dean, Bill Parker, Ed Walcoff, Carol King  
(tentative PDGs)

Six immediate past club presidents (to be chosen by Chair Gary Dilla)

## **STRATEGIC PLANNING**

Mike Norris, Chair

## **ZONE FUNCTIONS**

PDG Jim Efland

## **DISTRICT COUNCIL**

1. DG Bill Biddle
2. DGE Isaac Owolabi
3. DGN Tiffany Ervin
4. DGND *when selected*
5. IPDG Gary Dills
6. District Foundation Chair – Carol King
7. District Membership Chair – John Yermack
8. District Finance Chair – Milt Stork
9. District Public Image Chair – PDG Billi Black and DGN Tiffany Ervin
10. District Youth Services Chair – Regina Hartley
11. District Trainer – Jack McCaskill
12. International Service Chair - PDG Frank Dean
13. Two Past District Governors (selected by DG Biddle)  
Jim Efland  
Chuck Reiley
14. One current club president (2017-18) selected by DG Bill Biddle  
Richard Johannes
15. Two Current Assistant Governors selected by DGE Isaac Owolabi  
Ken Nicholson  
Jason Herman

## **FINANCE COMMITTEE**

1. Milt Stork (appointed by Bill Biddle as DGE)
2. DG Bill Biddle
3. DGE Isaac Owolabi
4. DGN Tiffany Ervin
5. IPDG Gary Dills
6. Three members at large
  1. Nancy Brooks, 3rd year appt by Bill Biddle
  2. Peggy Wike – 3<sup>rd</sup> year, appointed by DGN Gary Dills and is completing the term of the original appointee, Bob Soderstrom
  3. Len Jones -2nd year- appointed by DGN Isaac Owolabi
7. Non-Voting, Ex-officio Members
  1. DGND – when selected
  2. District Secretary Margaret Gormley-Chapman
  3. District Treasure Toby Allman

3/6/2017