

Rotary Carolinas' PETS



President-Elect Curriculum Materials



**ROTARY:
MAKING A
DIFFERENCE**

March 16-18, 2017

President-Elect Discussion Materials

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All materials utilized or referred to at Carolinas' PETS are available: www.carolinaspets.org



Planning Your Year of Effective Leadership

Learning Objectives

At the end of this session, participants will be able to:

1. Understand the importance of developing and using goal-setting and strategic thinking as proven, effective club management strategies
2. Use Club Central at www.rotary.org to work with club Directors and members to establish club goals for the coming year
3. Understand the importance of developing and/or updating the club’s strategic plan
4. Understand the key leadership issues in operating a Rotary Club
5. Use proven “best practices” for club leadership (NOW and throughout your year of leadership)

Notes & follow-up:

Planning Your Year of Effective Leadership, continued

<p style="text-align: center;"><u>Club Goal Setting</u></p>	<p style="text-align: center;"><u>Club Budgets/Budgeting</u></p>
<p style="text-align: center;"><u>Preparing YOUR Leadership Team</u></p>	<p style="text-align: center;"><u>Club Assemblies</u></p>
<p style="text-align: center;"><u>Member Access</u></p>	<p style="text-align: center;"><u>Leading Meetings</u></p>
<p style="text-align: center;"><u>Strategic Planning/Club Continuity</u></p>	

Planning Your Year of Effective Leadership, continued

- As President, what are YOUR GOALS for you club during the year you serve as Club President?
- How will you use the Rotary International MyRotary's CLUB CENTRAL to develop and plan your club's goals?
- Effective clubs have effective leadership TEAMS; it's hard for one person to make a truly effective club! How are you developing your leadership team? LOOK FOR NEW (and also proven) IDEAS in this session.
- Your Club's Bylaws:
 - What's IN your club's Constitution & Bylaws?
 - Are your Bylaws up-to-date?
 - Do your members have a copy?
 - Do YOU have a copy?
 - Do your Bylaws need changing?
 - HOW do you do this?
- What does the phrase "Club Administration" mean to you?
- Do your Officers and Directors/Board Members FULLY understand their function and duties?
- What are the reporting requirements of Rotary International and of your Rotary District?
- Budget:
 - What is YOUR ROLE in your club's budget?
 - Does your club have a communicated budget?
 - Why is the "budget" so important?
- What is your club doing regarding "risk management"?

Planning Your Year of Effective Leadership, continued

Goal Setting

- Have you set your club goals for the coming year?
- How does your club determine which goals to set? Who will help you set your Club's annual goals?
- What are the steps to setting your club's annual goals?

Key Points

The following “best practices” strategies can help you and your clubs achieve desired goals:

- Establish and communicate a clear timeline
- Outline the specific steps needed to achieve the goal (actions needed)
- Determine WHO is responsible for implementing each step and assign the responsibility
- Consider the resources/tools available to help you
- Identify the criteria for measuring the club's progress and for what constitutes success
- Monitor/evaluate/report on the progress toward the goal

Planning Your Year of Effective Leadership, continued

Leading Effective & Engaging Meetings

To help ensure effective weekly meetings, club presidents can:

- Delegate the responsibility of arranging interesting programs to a club administration or program committee
- Create and publish meeting agendas/bulletins in advance
- Relate programs to current club projects and activities using the Rotary monthly theme calendar (see Resources and References Handout #6)
- Include programs that update members of Rotary information
- Begin and end the meetings on time
- Show Rotary Videos to begin your meeting to showcase projects around the world
- Display a slideshow of Rotary Images and your club's photos to show pride in Rotary members at work and service.
- Have a contingency plan in case the scheduled program is cancelled

What will you discuss at your club assembly?

- Annual and long-range goals, goal setting, and club budget/finances
- Service projects and club activities
- Key committee reports/activities/updates
- Club training and member education strategies
- Membership engagement, growth, and retention strategies
- Attendance at the district conference or other district and RI meetings
- Any topic raised in an open forum

Planning Your Year of Effective Leadership, continued

Building Effective Clubs

- When the year you serve is over, will your club be viewed by your members and your community as:
 - A. MORE EFFECTIVE AND ENGAGING?
 - B. ABOUT THE SAME?
 - C. LESS EFFECTIVE?
- Will you and your officers (and your club) set measurable and meaningful goals for your year of leadership? (Hint: If you don't, how will you determine what has been accomplished and what worked well – or didn't?)
- Are your club “financials” in good order? Does your club have a well-prepared and communicated Budget? Are there changes that should be made to your club's budget? (Hint: Does our club have unnecessary expenses that raise the cost of Rotary membership?)
- Are your regular club meetings viewed by the membership as well-run and “effective”? (Hint: Have you done a recent survey of your membership to see how they feel about the weekly meetings; there may be some great ideas and new suggestions awaiting you?)
- Could your club benefit by having a CLUB TRAINER?
- When is your NEXT (or first) Club Assembly? (Hint: This is a very powerful communication and information-sharing tool for a club president!)

Planning Your Year of Effective Leadership, continued

Resources and References

Rotary Club Central: <http://www.rotary.org/ClubCentral> (requires login to MyRotary)

Rotary Governance documents: <https://www.rotary.org/myrotary/en/learning-reference/policies-procedures/governance-documents>

Rotary Council on Legislation: www.rotary.org/col

Rotary monthly theme calendar: <https://www.rotary.org/myrotary/en/member-center/calendar>

Be a Vibrant Club: Your Club Leadership Plan:
<https://www.rotary.org/myrotary/en/document/be-vibrant-club-your-club-leadership-plan-north-america-245en>

Rotary Brand Central: MYROTARY → MANAGE → BRANDCENTER

Rotary Videos: <http://vimeopro.com/rotary/rotary-videos>

Rotary Images: <http://rotary.org/images>

LEAD YOUR CLUB: President 2016-19 Edition

- Chapters 1, 2 and 3
 - Rotary Strategic Plan: Appendix 1, page 6
 - Sample Agendas for Creative Club Meetings: Page 13
 - Rotary Training Events: Appendix 2, page 21
 - Financial and Risk Management Best Practice Checklist: Appendix 4, page 24
 - Sample Club Committee Structure: Appendix 5, page 32

Making the Most of Rotary's Public Image

Reference: *Lead Your Club*, 222 EN–(315), Chapter 5

Learning Objectives

At the end of this session, participants will be able to:

1. Understand the purpose of implementing and utilizing a Public Image plan for your Rotary Club
2. Identify strategies for Public Image engagement on a continuing basis.
3. Share proven ideas/ways for using Public Image.
4. Collaborate with peers (here at PETS and at your club) on Public Image plans throughout the year.
5. Understand the vital role that Public Image plays in member attraction and club project awareness.

Notes & follow-up:

Making the Most of Rotary's Public Image, continued

<u>Attracting Members</u>	<u>Community Awareness</u>
<u>Increase Foundation Gifts</u>	<u>Social Media Engagement</u>
<u>Traditional Media Engagement</u>	<u>Telling Your Rotary Story</u>
<u>Innovation</u>	<u>Other</u>

Making the Most of Rotary's Public Image, continued

Reasons for Rotary

Making the Most of Rotary and Your Club's Public Image – Reasons for Rotary --
Handout #3

Please answer the following questions with 3-5 bullet points each.

Why did you join Rotary?

-
-
-
-
-

Why have you stayed with Rotary?

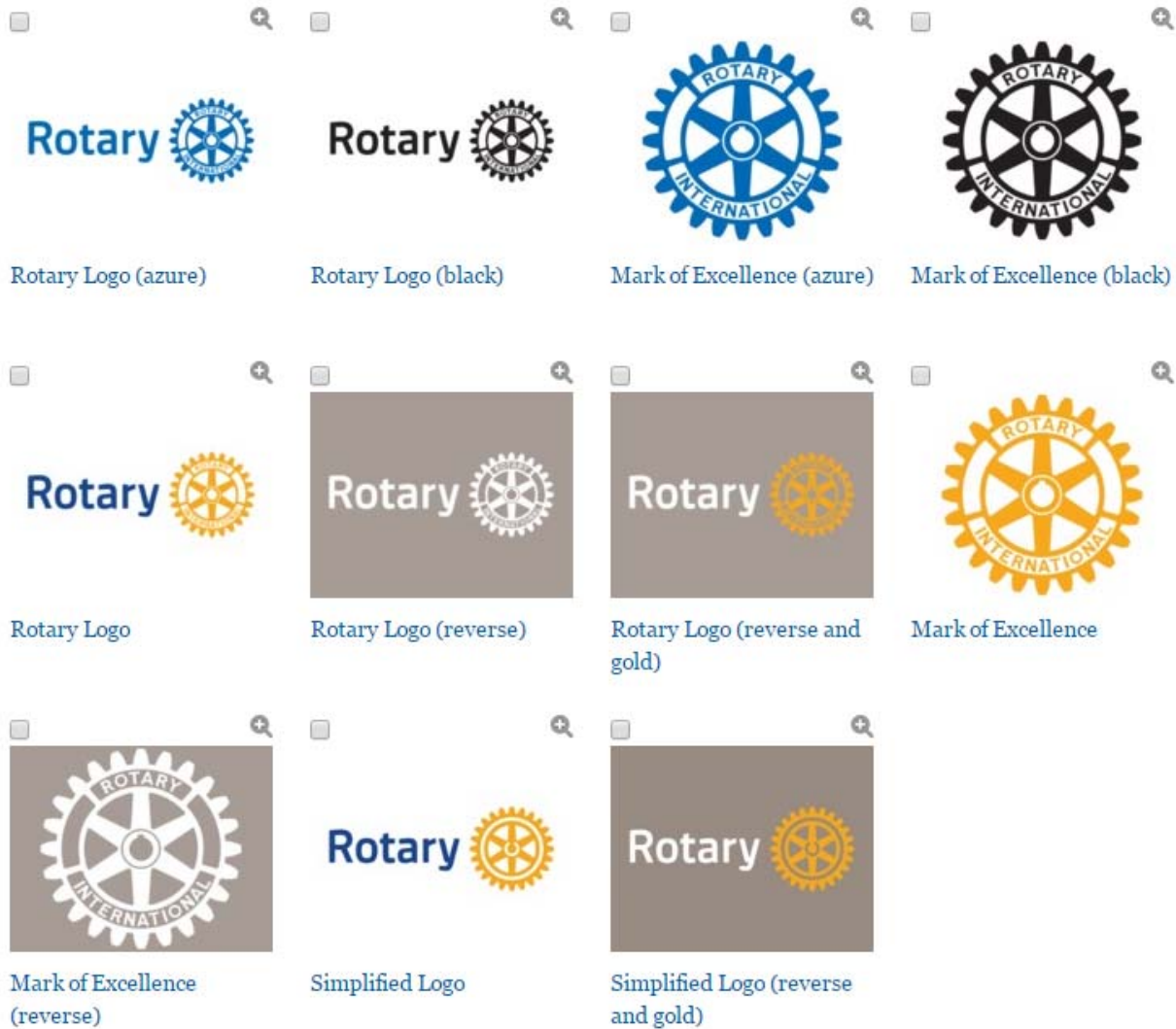
-
-
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The answers to these questions become YOUR Rotary Story.

Making the Most of Rotary's Public Image, continued

Rotary Logos as found in MyRotary's Brand Center

<http://www.rotary.org/brandcenter>





Making the Most of Rotary's Public Image, continued

Rotary Logos as found in MyRotary's Brand Center

Rotaract Logo (red)	Rotaract Logo (black)	Rotaract Logo (reverse)	Interact Logo (blue)
Interact Logo (black)	Interact Logo (reverse)	End Polio Now Logo	End Polio Now Logo With Wheel
Foundation Logo (black)	Foundation Logo (azure)	Foundation Logo (reverse)	Foundation Logo (reverse with gold)
Foundation Logo			

Making the Most of Rotary's Public Image, continued

Highlight Program Speakers Using Social Media

- Post and TAG that your speaker is coming a few days prior to your club meeting
- Post and TAG the speaker WHILE they are at your meeting
- Post a thank you within one business day, again TAGGING the speaker
- Get as many of your members as possible to follow the above 3 steps and post on their personal social media pages too.
- What does this do?
 - It spreads the information out past your own network
 - It showcases the great club programs your club has
 - It creates club engagement
 - Through the “viral” effect of sharing, more become aware of your club and the great work it does within the community
 - It acts as an attraction tool for future member candidates
 - All of this is part of your club's Branding!



Making the Most of Rotary's Public Image, continued

References, Resources, Tools and Support

Public Relations: <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/public-relations>

Lead Your Club: Public Relations Committee Manual:

<https://www.rotary.org/myrotary/en/document/lead-your-club-public-relations-committee>

Media Crisis Handbook: <http://shop.rotary.org/Media-Crisis-Handbook/dp/B0043JEYYW>

Rotary Fact Sheet: <https://www.rotary.org/myrotary/en/document/rotary-glance>

This is Rotary brochure: <https://www.rotary.org/myrotary/en/document/rotary>

End Polio Now: <http://www.EndPolioNow.org>

Sample Proclamation: <https://www.rotary.org/myrotary/en/document/pr-sample-proclamation-world-rotary-day>

World Polio Day sample press release:

<https://www.rotary.org/myrotary/en/document/world-polio-day-sample-press-release-template>

Make sure your site's ready for mobile-friendly Google search results:

<https://support.google.com/adsense/answer/6196932?hl=en>

Club Public Image Committee

District Public Image Committee

Rotary Public Image Coordinator (RPIC) and their assistants

Engaging Your Community

Reference: *Lead Your Club*, 222 EN–(315), Chapter 7

Learning Objectives

At the end of this session, participants will be able to:

1. Identify the ingredients of an effective community-building service project that helps to tell Rotary’s story
2. Determine a balanced program of service for the club
3. Understand the role and importance of YOUR leadership and commitment in your club’s service projects
4. Understand the importance of periodically evaluating every club project
5. Discuss specific ways to encourage and strengthen club projects
6. Identify the “best practices” of successful and effective club projects

Notes & follow-up:

Engaging Your Community, continued

<p><u>Identifying Community Needs</u></p>	<p><u>Projects should assist in driving new membership.</u></p>
<p><u>Rotary's Public Image Should Always be a Factor</u></p>	<p><u>Determining Whether A Project Is A Good "Fit" For Your Club</u></p>
<p><u>Insuring Club Support/Participation</u></p>	<p><u>Involving Members & Committees</u></p>
<p><u>Partnering With Another Organization</u></p>	<p><u>Evaluating A Completed Project</u></p>



Engaging Your Community, continued

OBJECT OF ROTARY

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

FIRST: The development of acquaintance as an opportunity for service;

SECOND: High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

THIRD: The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH: The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

Notes & follow-up:

Engaging Your Community, continued

AVENUES OF SERVICE

We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity. Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.

Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society. Learn more in *An Introduction to Vocational Service* and the *Code of Conduct*.

Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest. Learn more in *Communities in Action: A Guide to Effective Projects* and this Community Service presentation (PPT).

International Service exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.

Youth Service recognizes the importance of empowering youth and young professionals through leadership development programs such as Rotaract, Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.

Notes & follow-up:

Engaging Your Community, continued

KEY POINTS

- We are in the “business” of service. “Service Above Self” is Rotary’s principal motto.
- Every Rotarian is tasked with the responsibility for finding ways to improve the quality of life in his or her community and around the world through service projects.
- Service projects provide opportunities for both member and community involvement and fellowship.
- Service projects are also a part of your club’s public image and the image of Rotary International.

A successful service/community-impact project requires the following steps:

- Conduct a needs assessment to determine the needs and concerns of the community. Projects repeated for many years can lose effectiveness and community impact.
- Develop a plan to ensure the project will be meaningful and successful
- Implement the project to provide the service.
- Evaluate current projects to plan for future projects, learning from the successes and the failures; evaluation should be a part of all stages, from project planning to implementation and post-project review

Engaging Your Community, continued

Community Engagement Resources

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the Official Directory and at www.rotary.org. Download publications at www.rotary.org, or order them through shop.rotary.org, shop.rotary@rotary.org, or your international office.

The following resources are available to help you conduct successful service projects. They can be found from the Lifecycle of a Project webpage on MyRotary. MyRotary → Take Action → Develop Projects → Lifecycle of a Project.

Communities in Action (605a-EN) — Provides comprehensive instructions for planning, conducting, and evaluating a service project.

Community Assessment Tools (605-EN) Provides comprehensive details for how to conduct community assessments.

Lead Your Club: Service Projects Committee (225d-EN) – A comprehensive manual for your club's Service Projects Committee.

Rotary Showcase User Guide – This guide will teach any Rotarian what Rotary Showcase is and how to use it effectively. It includes an anatomy of an efficient Showcase project including some featured past projects.

Rotary's Areas of Focus (965-EN) – Provides excellent examples of service projects in each of Rotary's Six Areas of Focus

Human Resources

Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.

MyRotary – Visit EXCHANGE IDEAS → COMMUNITY MARKETPLACE to find Rotarians and Rotaractors who are developing innovative resources that help clubs and districts connect with each other.

MyRotary – Visit EXCHANGE IDEAS → DISCUSSION GROUPS to find a group that is discussing projects that you may want to emulate, or learn from, or even extend.

Engaging Your Community, continued

Human Resources, continued

Rotarian Action Groups — International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to conduct international service projects related to a specific topic.

Informational Resources

Club Central – Club assessment and goal-setting tools used to plan service project goals. Via the RI website and through new Webinars, learn more about the system and how it can help your club plan for your year.

Club Assessment Tools (808–EN) - A companion piece to the Membership Development Resource Guide

RI programs newsletters — E-newsletters on specific RI programs. Sign up at www.rotary.org

Rotary Community Corps Handbook (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders; also includes case studies and project ideas.

The Rotary Foundation Quick Reference Guide (219-EN) — A detailed overview of the programs and services of The Rotary Foundation.

World Community Service Handbook: A Guide to Action (742-EN) — Information on the WCS program, including overviews of donations-in-kind projects and the Rotary Volunteers program, as well as Rotary Foundation grants.

Abuse and Harassment Prevention Training Manual / Leaders' Guide (775-EN) — Youth protection guidance that can be modified to comply with local laws and situations to create and maintain the safest possible environment for participants.

Financial Resources

Funds from individual donors or local businesses

Rotary Foundation grants and grants from other foundations

Funds solicited through the <http://Ideas.Rotary.org> database

Your Rotary Foundation

Reference: *Lead Your Club*, 222 EN—(315), Chapter 6

Learning Objectives

At the end of this session, participants will be able to:

1. Identify the six areas of Rotary Foundation focus and how they relate to Rotary Foundation grants
2. Understand the IMPORTANCE of YOUR leadership role AND how to support and communicate Foundation programs
3. Increase your knowledge about the types of Rotary Foundation grants and understand how clubs can use Foundation grants
4. Lead YOUR club in establishing Foundation support goals
5. Learn about your Foundation's Grant Funding & Management Model
6. How to use Public Awareness to increase Foundation Gifts
7. Identify the "best practices" of successful clubs.

Notes & follow-up:



Your Rotary Foundation, continued

YOUR Rotary Foundation has six specific Areas of Focus:

Promoting Peace

Fighting Disease

Providing Clean Water

Saving Mothers and Children

Supporting Education

Growing Local Economies

<https://www.rotary.org/en/learning-reference/about-rotary/areas-focus>

Your Rotary Foundation, continued

How will YOU support your club's Foundation Committee?

- Meet with the club's Foundation Committee BEFORE and DURING your term of leadership to review current and long-term Foundation goals and their achievement
- Regularly review your club's financial contribution trends in Rotary Club Central
- Attend and encourage attendance at your district Rotary Foundation seminars and other related events
- Help encourage club participation in Foundation giving and programs; lead by personal example and encourage your Board of Directors to also lead by example
- Support Foundation programs that offer opportunities for involvement as well as membership growth and retention
- Promote contributions from club members
- Identify what resources are available to help the club participate in Foundation programs
- Ensure that the club committee is working with the district's Rotary Foundation Committee

Your Rotary Foundation, continued

What are the benefits of Rotary's Grant Model?

The Rotary Foundation's grant model:

- Simplifies processes
- Expands service opportunities
- Builds a stronger sense of ownership among Rotarians for their Foundation
- Increases the collective impact of grants by concentrating more on the six areas of focus
- Understand and agree to the club memorandum of understanding (MOU)
- Ensure that reports on open grants are submitted timely

Your Rotary Foundation, continued

What are some of YOUR club's "Best Practices" regarding the Rotary Foundation?

- Establish/strengthen your club's Rotary Foundation Committee
- Plan a club program about the Rotary Foundation every quarter (especially in November, Rotary Foundation Month)
- Include a brief story about the Rotary Foundation in every club program (e.g., a "Foundation Minute")
- Schedule presentations that inform club members (especially new members) about your Rotary Foundation
- Insure that your club is well-represented (by YOU and your Foundation Committee Chair and Foundation Committee members at the district Foundation Seminar)
- Seek out ways to use and participate in Rotary Foundation Grants
- Investigate "partnering" opportunities with other clubs
- Recognize (warmly and publicly) club members' financial contributions to TRF and their participation in Foundation programs; make recognitions special! (Example: Invite your Governor to present new Paul Harris Fellow and other recognitions)
- Help club members understand the relationship between Foundation giving and Foundation grants/programs

Your Rotary Foundation, continued

<p><u>Foundation Focus Areas</u></p>	<p><u>Club Foundation Committee</u></p>
<p><u>Knowledge of YOUR Foundation</u></p>	<p><u>Foundation Programs</u></p>
<p><u>District Foundation Seminar</u></p>	<p><u>Promoting YOUR Foundation</u></p>
<p><u>Recognizing Club Members for Their Foundation Support</u></p>	<p><u>Getting Involved in Projects</u></p>



Your Rotary Foundation, continued

Resources

“What other Rotary Foundation resources are available?”

- Rotary Foundation resources include:
- Your District Rotary Foundation chair and committee
- Your District Rotary Foundation Seminar (PLAN NOW TO GO)
- Your District Grant Seminar (Plan to send your President-Elect and Foundation Chair-Elect)
- Your District governor and assistant governors
- Your Regional Rotary Foundation coordinator
- Your Rotary Foundation staff at RI World Headquarters

The following are suggested as informational club resources:

- www.rotary.org
- www.rotary.org/myrotary/en/rotary-foundation
(become familiar with all links and sub links on this page)
- E-learning modules

<http://learn.rotary.org/Pages/Catalog/CourseCatalog.aspx?subject=40>

- Rotary Foundation Basics
- Rotary Six Areas of Focus and Choosing a Grant



Membership Engagement, Growth, and Development

Reference: *Lead Your Club*, 222 EN–(315), Chapter 4

Learning Objectives

At the end of this session, participants will be able to:

1. Identify strategies to engage existing members and attract new members on a continuing basis.
2. Share proven ideas/ways for communicating with and engaging potential, new, and current members.
3. Collaborate with peers (here at PETS and at your club) on membership plans throughout the year.
4. Understand the vital roles that member engagement and member education (i.e., continuing member education) play in member retention and club enthusiasm (aka morale).
5. Identify the “best practices” of successful clubs.

Notes & follow-up:

Membership Engagement, Growth, and Development, continued

<u>Attracting Members</u>	<u>Educating Members</u>
<u>Engaging Members</u>	<u>Prospective Members</u>
<u>Retaining Members</u>	<u>Exit Interviews</u>
<u>Diversity</u>	<u>Sponsoring New Clubs</u>
<u>Innovation</u>	

Membership Engagement, Growth, and Development, continued

The Benefits of Being a Member of Rotary!

- Giving of service to others
- Rotary Action Groups
- Creating new networks and connections
- Personal growth via the sharing and learning of leadership skills
- Sharing of fellowship
- Participating in Rotary Fellowships (more than 70 available)
- Hearing outstanding programs from high-impact speakers
- Mentoring youth
- Recognition through awards
(<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/awards>)
- Rotary Global Rewards (<https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>)

Notes & follow-up:

Membership Engagement, Growth, and Development, continued

Effective Club Membership Development

- A club can't exist/grow without a stable AND engaged and committed membership
- A solid membership base can increase the club's service, fellowship, and community visibility
- Membership "development/engagement" is an ongoing process that requires leadership and emphasis
- Membership development includes:
 - Attraction/Recruitment
 - Retention
 - Education
 - Engagement (of all members)
 - Organizing new clubs – includes Satellite clubs, Interact & Rotaract clubs, new Rotary clubs
 - Engaging Alumni Connections
 - Interact
 - Rotaract
 - Rotary Youth Exchange
 - RYLA
 - Rotary Peace Fellows
 - Rotary Scholarships & Ambassadorial Scholarships
 - Vocational Training Teams / GSE teams
 - Rotary Volunteers (Rotary Community Corps)

KEY POINTS: A vibrant, active Club Membership Committee and a Club Trainer can greatly assist your club in achieving its goals!

Membership Engagement, Growth, and Development, continued

Rotary Education

- Education about Rotary
 - Keeps members involved
 - Increases retention
 - Keeps members aware of Rotary activities worldwide
 - Creates motivation and enthusiasm
- Education is important for those in all stages of Rotary club membership, including
 - Prospective members
 - New members
 - Current members
- Club Assemblies are VERY effective for member education/engagement
- Rotary Leadership Institute: proven to significantly increase member retention (<http://rlinews.blogspot.com/2015/10/study-links-rli-to-26-increase-rotary.html>)

Notes & follow-up:

Membership Engagement, Growth, and Development, continued

Resources and References

The following are suggested informational club resources; they are valuable tools and come from the Rotary International website:

- Chapter 4 of the *Lead Your Club: President 2016-19 Edition*
- Rotary Club Central
- *Get More Out Of Membership: Connect For Good*
<https://www.rotary.org/myrotary/en/document/connect-good>
- *Strengthening Your Membership: Creating Your Membership Development Plan*
<https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>
- *Lead Your Club: Membership Committee Manual 2016-19 Edition*
<https://www.rotary.org/myrotary/en/document/lead-your-club-membership-committee>
- Club Assessment Tools
<https://www.rotary.org/myrotary/en/document/club-assessment-tools>
- Membership section of MyRotary
<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership>
- New Member Orientation: A How-to Guide for Clubs
<https://www.rotary.org/myrotary/en/document/new-member-orientation-how-guide-clubs>
- Rotary Basics (such as the *ABC's of Rotary*)

Continued ...

Membership Engagement, Growth, and Development, continued

Resources and References, continued

- Rotary Awards: <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/awards>
- Rotary Global Rewards Program: <https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>
- Rotary Newsletters: <http://www.Rotary.org/newsletters>

Five Things You Can Do Now!

1. Make your programs/meetings dynamic and inviting.
2. Give members the chance to use their knowledge and expertise, or learn new skills, by providing interesting and challenging assignments.
3. Consider providing flexible meeting times. Perhaps, even consider starting a Satellite club.
4. Plan family-friendly/involved events.
5. Invite young professionals to experience Rotary by including them in your club's projects and social events.

RI MEMBERSHIP RESOURCE GUIDE, January 2017 Edition

The names of hyperlinked resources appear with an underline and usually in a blue font and can be downloaded on www.rotary.org by clicking on the hyperlink, or ordered on shop.rotary.org with the SKU number provided. If you experience any trouble when placing your order, please email membershipdevelopment@rotary.org or shop.rotary@rotary.org.

PUBLICATIONS			
Name	Description	Audience	Available
Strengthening Your Membership	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents and membership committees, and district membership chairs	http://shop.rotary.org/ (SKU: 417)
New Rotary Clubs Quick Start Guide	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors	N/A
New! Introducing New Members to Rotary	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership	http://shop.rotary.org/ (SKU: 414)
Be A Vibrant Club	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture. Versions are available for fifteen different regions, each featuring its own club success story.	Club leadership	http://shop.rotary.org/ (SKU: 245A)
Connect for Good	Eight-page guide shows how to get involved and connect with Rotary. Provides an updated overview on Rotary for all members.	Current members	http://shop.rotary.org/ (SKU: 595)
Membership Assessment Tools	Learn how to evaluate and improve your membership development plan with these tools. Complete with sample surveys and information on organizing new clubs, recruiting and retaining members, this is an all-encompassing tool	Current members	http://shop.rotary.org/ (SKU: 801)
New! Impact Begins With You	This prospective member brochure explains who we are and what sets us apart from other organizations.	Prospective members	http://shop.rotary.org/ (SKU: 001)



REPORTS			
Name	Description	Audience	Available
Five Year History of Member Start Figures	Shows membership numbers for 1 July by region, for the year specified in the report name.	District and zone leadership	Rotary Club Central
Membership Comparison to 1 July	Monthly report that shows a comparison of current year club and member totals with previous year club and member totals for selected district(s).	District and zone leadership	Rotary Club Central
District Progress to Goal	Shows progress towards membership goals for selected district(s) or club.	Zone leadership	Rotary Club Central
Clubs in My District	Shows club and member totals for district, member totals by club, and lists newly chartered and terminated clubs for selected districts.	District and zone leadership	Rotary Club Central
Alumni Report Guide	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership	http://www.highroadsolution.com/file_upload2/files/how+to+use+the+program+participants+and+alumni+report.pdf

TOOLS			
Name	Description	Audience	Available
Rotary Club Central	Track your goals and activities in membership, service, and foundation giving.	Club and district leaders	https://www.rotary.org/myrotary/en/secure/13301
Rotary Showcase	Post and share club or district service project information.	Rotary members	http://map.rotary.org/en/project/pages/project_showcase.aspx
Rotary Ideas	Post your projects and ideas and ask for partners, volunteers, funding, or other support.	Rotary members	http://ideas.rotary.org/
Membership Best Practices Discussion Group	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members	https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices
Rotary Club Health Check	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders	N/A

RESOURCES			
Name	Description	Audience	Available
New! Club Flexibility web page	This new web page offers ways clubs can implement the new flexible options Council decisions granted them. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members	N/A
New! Understanding Membership Reports: Getting Started	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members	N/A
New! Creating a Positive Experience for Prospective Members	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members	N/A
Proposing New Members	Best practices for proposing new members to your club.	Rotary members	N/A
How to Manage Membership Leads	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs
How to Manage Membership Leads	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts
New Member Welcome Kit	Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, and Proud Member window cling.	New members	http://shop.rotary.org/ (SKU: 426)
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders	www.rotary.org/en/news-features/newsletters
Young Professionals Summit Report	A report that shares strategies, ideas, and key findings from the Young Professionals Summit held in Chicago September 2014.	Rotary members	http://www.highroadsolution.com/file_upload2/files/yps+summit+report_final.pdf
How to Lead a Young Professionals Summit Guide	Learn how to plan, organize, and lead a young professionals summit to energize and engage your members as you discuss how to create a more appealing and engaging Rotary experience for all members.	Rotary members	http://www.highroadsolution.com/file_upload2/files/ic15+breakout_how+to+lead+a+young+professionals+summit.pdf
Strategic Planning Guide	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders	https://www.rotary.org/myrotary/en/document/strategic-planning-guide



WEBINARS			
Name	Description	Audience	Available
Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members	https://vimeo.com/180066536
Membership: It's Now or Never (Part 1 of 5)	An international membership expert discusses new ways of thinking about membership and innovative tactics in part 1 of this "Membership Matters" webinar series.	Rotary members	https://vimeo.com/103365589
Perception vs. Reality: Club Evaluation and Visioning (Part 2 of 5)	Focuses on the steps clubs should take to ensure a clear club vision and plan for the future.	Rotary members	https://vimeo.com/108381769
Simple Steps to Innovate Your Club (Part 3 of 5)	Focuses on the steps clubs can take today to stay relevant and appeal to new and potential members.	Rotary members	https://vimeo.com/118740192
Membership Engagement: The Key to Retention (Part 4 of 5)	Focuses on member engagement as a path to member retention.	Rotary members	https://vimeo.com/123234534
How to Recruit New Members and Strengthen Your Club (Part 5 of 5)	Focuses on growing and strengthening clubs by inviting new and diverse groups of professionals to club meetings, asking friends and colleagues to participate in service projects, and reaching out to Rotary program alumni.	Rotary members	https://vimeo.com/127084618
Understanding Young Professionals	Led by Rotary staff and a market research professional, this webinar is intended to help members better understand the perceptions and needs of young professionals. Password: YPC	Rotary members	https://vimeo.com/89536946
Alumni Reports and Awards	Outlines the new district alumni reports.	Rotary members	https://vimeo.com/123449923

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

PILOTS			
Name	Description	Audience	Available
2011-2017 Pilot Clubs	List of Rotary clubs currently in the pilot program.	Club, district, and zone leaders	https://rotary.qualtrics.com/CP/File.php?F=Fbvo7B5IWCHgEQPX
2015-2017 Innovative and Flexible Rotary Club Pilot Expansion	List of Rotary clubs currently in the Innovative and Flexible Rotary Club Pilot Expansion program.	Club, district, and zone leaders	https://rotary.qualtrics.com/CP/File.php?F=F8icMSdlcseArJoF
Pilot update	An update on the 5 membership pilot projects that are testing new membership types or club operation innovations.	Club, district, and zone leaders	https://rotary.qualtrics.com/CP/File.php?F=F0B8WRNiaNPuoY5f

CLUB ADMINISTRATION			
Name	Description	Audience	Available
Standard Rotary Club Constitution	Required bylaws to be adopted by every Rotary club.	Club leaders	https://www.rotary.org/myrotary/en/document/standard-rotary-club-constitution
Recommended Rotary Club Bylaws	Recommended bylaws for administering and operating Rotary clubs.	Club leaders	https://www.rotary.org/myrotary/en/document/recommended-rotary-club-bylaws
Rotary Code of Policies	Provides information on club and district administration, RI, programs, communications, events, and finances.	Club and district leaders	https://www.rotary.org/myrotary/en/document/rotary-code-policies

The last four pages in this Membership section of our curriculum are courtesy of Rotary International’s Membership Development Staff. The original document containing these links is updated quarterly. These tables were extracted from the January 2017 edition.

If you have any questions about these specific references, please contact:

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Rotary Carolinas' PETS



Arden, Asheville, Asheville Breakfast, Asheville-Biltmore, Asheville-Metro, Asheville-South, Asheville-West, Avery County, Black Mountain, Blowing Rock, Boone, Boone Sunrise, Brevard, Bryson City, Burke-Sunrise, Burnsville, Caldwell County, Cashiers Valley, Catawba Valley (Conover), Clay County, Denver/Lake Norman, Four Seasons Satellite, Franklin, Franklin Daybreak, Granite Falls, Haywood County (Canton), Hendersonville, Hendersonville-Four

Seasons, Hickory, Hickory Sunrise, Highlands, Highlands-Mountaintop, Lake Hickory (Hickory), Lenoir, Lincolnton, Lincolnton-Sunrise, Madison County, Marion, McDowell County, Morganton, Murphy, Newton-Conover, Pisgah Forest, Rutherford County, Sherrills Ford-Terrell, Spruce Pine, Sylva, Tryon, Valdese, Waynesville, Waynesville-Sunrise, Albemarle, Alleghany County, Ballantyne, Belmont, Boiling Springs Area, Cabarrus County, Charlotte, Charlotte Dilworth South End, Charlotte North, Charlotte End-of-the-Week, Charlotte International, Charlotte Providence, Charlotte South, Charlotte South Park, Charlotte Top-of-the-Week, Charlotte University City, Charlotte West, Charlotte-Evening, Cherryville, China Grove, Concord, Concord Afton-Sunset, Davidson, Gaston Breakfast, Gastonia, Gastonia East, Gastonia Evening, Greater Statesville, Hamlet, Huntersville Happy Hour, Kannapolis, Kings Mountain, Lake Norman-Huntersville, Marshville, Matthews, Mecklenburg County-South, Monroe, Monroe-Union Breakfast, Mooresville, Mooresville-Lake Norman, Mount Holly, North Mecklenburg County, North Wilkesboro, Rockingham, Rowan County, Salisbury, Shelby, Shelby Breakfast, Southwest Cabarrus, Statesville, Statesville/Fourth Creek, Taylorsville, Top of the Lake-Mooresville, Troutman, Union West (Indian Trail), Wadesboro, Waxhaw-Weddington, West Stanly, Alamance (Burlington), Alamance Breakfast, Archdale-Trinity, Asheboro, Burlington, Carthage, Clemmons, Crescent (Greensboro), East Greensboro, EClub of D7690, Eden, Furnitureland, Gate City, Graham, Greensboro, Greensboro Airport, Guilford (Greensboro), High Point, Hillsdale Sunrise, Jamestown, Jonesboro (Sanford), Kernersville, King, Lexington, Liberty, Madison-Mayodan, Midstate (Asheboro), Mocksville, Mount Airy, Pinehurst, Pittsboro, Randolph (Asheboro), Reidsville, Reynolda (Winston-Salem), Sandhills (Southern Pines), Sanford, Siler City, Southern Guilford, Southern Pines, Stoneville, Stratford (Winston-Salem), Summit (Greensboro), Surry Sunrise, Thomasville, Triad (High Point), Troy, Walnut Cove, Western Forsyth, Winston-Salem, Yadkin Valley, Yadkinville, Angier, Apex, Apex Sunrise, Capital City, Cary, Cary Central, Cary MacGregor, Cary-Kildaire, Cary-Page, Central Johnston County, Chapel Hill, Chapel Hill-Carrboro Sunrise, Clayton, Clayton Mid-Day, Cleveland School, Crabtree, Dunn, Dunn-Erwin, Durham, Durham Sunrise, EClub of D7710, East Chapel Hill, Fuquay-Varina, Fuquay-Varina Downtown, Garner, Garner Mid-Day, Henderson, Hillsborough, Holly Springs, Kerr-Tar Region, Lillington, Morrisville, North Raleigh, Oxford, Raleigh, Raleigh Midtown, Raleigh Parkside, Research Triangle Park, Roxboro, South Granville County, Southwest Durham, Wake Forest, Wakefield/Wake Forest, Warrenton, Wendell, West Raleigh, Zebulon, Ahoskie, Ayden, Belhaven-Pantego, Bethel, Columbia, Currituck Wild Goose, Edenton, Elizabeth City, Elizabeth City Morning, Elm City, Farmville, First Flight (Kill Devil Hills), Fremont, Goldsboro, Goldsboro-Three Eagles, Greater Wilson, Greenville, Greenville (Morning), Greenville Noon, Havelock-Cherry Point, Hertford, Kitty Hawk, Manteo, Mount Olive, Murfreesboro, Nash-Rocky Mount, Neuse Sunrise (Bridgeton), New Bern, New Bern-Breakfast, North Banks (Kill Devil Hills), Oriental, Roanoke Rapids, Rocky Mount, Snow Hill, Tarboro, Vanceboro, Washington, Washington (Noon), Williamston, Wilson, Windsor, Beaufort-Ole Towne, Bladenboro, Burgaw, Clinton, Clinton-Sampson County, Coastal Pender, Duplin, Elizabethtown, Fair Bluff, Fairmont, Fayetteville, Fayetteville LaFayette, Jacksonville, Jacksonville Breakfast, Jacksonville South, Kinston, Kinston Evening, La Grange, Laurinburg, Leland Area, Lumberton, Maysville, Morehead City, Morehead City After Hours, Morehead City Navigators, Morehead City Soundview, Morehead City-Lookout, Morehead City-Noon, New River (Onslow County), Newport, Pollocksville, Red Springs, Richlands, Shallotte, Sneads Ferry, South Brunswick Islands (Ocean Isle), Southport, Southport Sundowners, Swansboro, Tabor City, Trenton, Wallace, West Fayetteville, Whiteville, Wilmington, Wilmington Cape Fear, Wilmington Central, Wilmington East, Wilmington South, Wilmington West, Abbeville, Aiken, Aiken Sunrise, Anderson, Batesburg-Leesville, Blacksburg, Chester, Clemson, Clemson-Calhoun, Clinton, Clover, Easley, EClub of the Carolinas, Emerald City, Fair Play, Fort Mill, Fountain Inn, Gaffney, Golden Strip Sunrise, Greater Anderson, Greater Greer, Greenville, Greenville Breakfast, Greenville East, Greenville Evening, Greenwood, Indian Land, Inman, Lake Wylie, Lancaster, Lancaster Breakfast, Laurens, Mauldin, McCormick County, Newberry, North Augusta, North Greenville, North Spartanburg, Pickens, Pleasantburg, Rock Hill, Seneca, Seneca Golden Corner, Simpsonville, Spartan West, Spartanburg, The Foothills, Twin City Batesburg-Leesville, Union, Walhalla, Westminster, Winnsboro, Woodruff, York, Assistant Governor, District Governor 2016-2017, District Governor 2017-2018, District Governor 2018-2019, District Governor 2019-2020, District Administrator, District Executive Secretary, District Secretary, District Trainer, RI President 2013-2014, RI Past Director, Rotary Foundation Trustee, RI General Secretary, Guest Speaker, RI Club & District Support, RI Membership Staff, Rotary Foundation Staff, Rotary Coordinator, Rotary Public Image Coordinator, Rotary Regional Foundation Coordinator, Rotary Regional Membership Coordinator, Discussion Leader, PETS Staff, Vendor, Exhibitor