

Rotary Carolinas' PETS



President-Elect Curriculum Materials

***CREATE
LASTING
IMPACT***

Rotary 

March 19-21, 2026

HOW TO TALK ABOUT OUR ACTION PLAN

Like the People of Action who inspired it, Rotary's plan for the future is bold.

This glossary will help all of us at Rotary speak about our goals with one voice and one vocabulary so we can move forward and act as one.

VISION

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

ACTION PLAN

The name for our five-year strategic plan, including four strategic priorities and 14 objectives.

PARTICIPANTS

All Rotary members and other individuals who engage in Rotary activities.

STRATEGIC PRIORITIES

INCREASE OUR IMPACT

Define, measure, track, and capture data from service projects to measure our impact, improve project quality, and create lasting change.

EXPAND OUR REACH

Develop new models of engagement to attract diverse Rotary participants and unite them in taking action.

ENHANCE PARTICIPANT ENGAGEMENT

Create new ways to inspire participants and provide valuable experiences that make them want to stay.

INCREASE OUR ABILITY TO ADAPT

Make Rotary's operating and governance structures more efficient, representative, flexible, and effective.

OBJECTIVES

The specific things we want the *Action Plan* to accomplish.

INITIATIVES

The actionable steps to achieve each objective. The Secretariat, with oversight from the Strategic Planning Committee, is responsible for accomplishing them.

INPUTS

The resources invested in a program.
Example: The materials used in a literacy program.

OUTPUTS

The immediate results of a program.
Example: The number of people who complete a literacy program.

OUTCOMES

The short-term or intermediate results of a program.
Example: The number of people who gain reading proficiency in a literacy program.

IMPACT

The long-term effects or end results of a program.
Example: The changes in education outcomes for the community.

President-Elect Discussion Materials

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



EFFECTIVE LEADERSHIP

Learning Objectives

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

1. Understand the key leadership issues in operating a Rotary Club
 - a. Apply the Rotary Action Plan to strengthen your club
 - b. Setting 3-Year Goals and Using Regional Plans
 - c. Assembling & Preparing a Leadership Team
 - d. Succession & Sustainability Planning
 - e. Leading Effective Meetings
 - f. Club Assemblies
 - g. Budgets & Budgeting

2. Use proven “best practices” for club leadership (NOW and throughout your year of leadership)

Notes & follow-up:



EFFECTIVE LEADERSHIP

SETTING 3-YEAR GOALS AND USING REGIONAL PLANS

- Rotary's approach is shifting from planning mainly for one year at a time to thinking further ahead and planning for three years. This will foster continuity and allow Rotary leaders at all levels to imagine and pursue more ambitious strategic goals that require collaborative efforts and lead to lasting change.
- To support this longer-term planning, each Director will appoint a regional plan team that will be responsible for coordinating a customized plan for the region. This regional plan will support the Action Plan's strategic priorities and help clubs achieve their goals.
- Presidents-elect should set goals in Rotary Club Central on behalf of their clubs, using the club's current situation as the baseline and its strategic plan as a guide for the next three years. Future club presidents will be able to adjust the goals as needed, always planning three years ahead.
- The most successful Rotary clubs plan for their future!

LEADERSHIP TEAM

- Effective clubs have EFFECTIVE LEADERSHIP TEAMS!! How are you developing your leadership team?
- Timing – NOW is the time to have your leadership team selected:
 - Membership Chair
 - Service Projects Chair
 - Rotary Foundation Chair
 - Public Image Chair
 - Club Administration or Program Chair
 - Club Learning Facilitator
 - Other Committee Chairs for fundraising, social events, etc.

EFFECTIVE LEADERSHIP, continued

SUSTAINABILITY & SUCCESSION PLANNING

Your role as President needs to ensure the vitality and future sustainability of the club. Developing a succession line of future leaders is an essential strategy for a healthy, vibrant club. Lack of sustainability & succession planning could mean that your current members become the last generation of Rotarians serving the needs of your community.

Club Leadership Development Culture

Identifying and cultivating future club leaders starts with:

- Committee assignment – a meaningful role on a key committee, preferably with a “mentorship-oriented” committee chair
- Committee Chair assignments – Clear-cut objectives and accountability where leadership skills are developed and demonstrated.
- Board members — Visibility into the inner workings of the club. Most club Boards have a two- or three-year term, with some members rotating on and off each year. What is your club’s Board rotation plan? What will you need to change, if anything, to adopt this process?
- Club President identification — Club Bylaws require the election of both a President and President- Elect in December to serve the following Rotary year (beginning July 1)
 - Many clubs also identify a President Nominee (to follow President-Elect), for a total of three years of identified forward leadership
 - Board Members and other Officers (Secretary, Treasurer) for the coming year should be elected at the same time
- All club leaders (Officers, Directors, key Committee Chairs) should be participating in available training opportunities:
 - Club Leadership Training Assemblies offered by your District
 - District Foundation & Grants Training
 - Rotary Leadership Institute (RLI)
 - RI Learning Center Courses



EFFECTIVE LEADERSHIP, continued

Thinking about your club:

- How many years forward are Presidents identified? _____
- My successor is: _____
- His/her successor (or likely successor) is: _____
- Which of our leadership candidates have completed (or started) Rotary Leadership Institute (RLI)? _____
RLI33.org
- Other sustainability strategies to consider:
 - _____
 - _____
 - _____

LEADING EFFECTIVE 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 my.rotary.org/en/news-media/calendar
- 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 during meals and fellowship time to show pride in Rotary members at work and service
- Have a contingency plan in case the scheduled program is cancelled
- **Refer to Club Meeting Agenda and Board Meeting Agenda on page 7**

EFFECTIVE LEADERSHIP, continued

What is the purpose for Club Assemblies?

- 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

YOUR ROLE IN CLUB ADMINISTRATION

- Review and update, if necessary, your club's Constitution & Bylaws
- Create a month-by-month budget for income and expenses — **See Budgets & Financial Management on page 8**
- Know the club's administrative policies and procedures (particularly as they relate to the role of the Board, the Secretary, and the Treasurer) that serve as the framework for the operation of a Rotary club
- Prepare so that your Officers and Directors/Board Members FULLY understand their function and duties
- Understand the reporting requirements of Rotary International & of your Rotary District and fulfill administrative duties to your District & Rotary International
- Prepare to make your Governor's visit the best in the District
- Oversee the responsible stewardship of club finances
- Understand what meetings you will lead and which ones you will delegate



EFFECTIVE LEADERSHIP, continued

CLUB MEETING AGENDA (sample)

- Opening/Welcome
- Pledge of Allegiance (optional)
- Song (optional)
- Ecumenical Invocation (optional)
- Visiting Rotarians, Guests
- New Member Introductions
- General Announcements
- Member News/Happy Bucks, etc.
- Speaker Introduction
- Speaker
- Closing Announcements/Reminders/Upcoming Events
- 4-Way Test

Club Meetings

1. Written Agenda
2. Everyone on Agenda receives in advance
3. Fit to your club and your club culture
4. Capture Visitor and Guest Names & Contact Information at Check-in

BOARD MEETING AGENDA (sample)

- Opening/Ecumenical Invocation (optional)
- Approval of Minutes, last meeting (Written minutes now required within 60 days of Board meeting per Council on Legislation)
- Secretary's Report
- New Member Proposals
- Resignations
- Treasurer's Report
- Balance Sheet
- Income Statement
- Delinquent Members
- Committee Chair Reports
- Progress Review - Presidential Citation & Governor's Award
- Closing Announcements/Reminders/Upcoming Events

Board Meetings

1. At least Quarterly
2. Written Agenda
3. Board receives Agenda in advance
4. Board receives Minutes in advance (Written minutes required < 60 Days after mtg.)
5. Best Practice – Record the meeting for the person writing Minutes
6. Recommendation – Board Retreat before July 1st



EFFECTIVE LEADERSHIP, continued

BUDGETS & FINANCIAL MANAGEMENT

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? (Does your club have unnecessary expenses that raise the cost of Rotary membership?)

- What is YOUR ROLE in your club’s budget?
- Why is the “budget” so important?
- Has your budget been updated to reflect current RI and District dues?

Budget Best Practices

- Club should have a Balance Sheet, showing all club assets (including reserves) and liabilities, updated at least monthly
- Club should have an Income Statement showing all income and expense categories, updated at least monthly
- Balance Sheet and Income Statement should be presented for Board review Monthly (Monthly to the Board; Quarterly to club membership)
- Budget should include all Income/Expense line items as estimated for coming year and look at history for two prior years when estimating
- Budget should include allowances for expenses outside club operations, such as reimbursement of officers for attendance at District events, Training, RLI, Pre-PETS, PETS, RI Convention, etc. Ensure that club dues are sufficient to cover RI and District dues, plus operating funds for the club
- Budget items should be monthly, as a Rotary club’s income and expenses are irregular with large expense items occurring at intervals during the year. Reserves must cover expenses between dues income intervals.

*Please note that Rotary Foundation contributions are not club cash reserves. Those funds are not the club’s funds, and should be forwarded monthly to TRF, or at a minimum, quarterly. *Best practice: Have all members enroll in TRF Rotary Direct and discontinue having club treasurer collect monies for TRF. Make this a part of the New Member Orientation process for all new members.*

EFFECTIVE LEADERSHIP, continued

RESOURCES

Rotary Club Central: my.rotary.org/ClubCentral

Club Leadership Courses on Rotary Learning Center: rotary.org/learn

- Be a Vibrant Club Course
- Is Your Club Healthy? Course

Rotary Governance documents: my.rotary.org/en/learning-reference/about-rotary/governance-documents

Council on Legislation: rotary.org/col

Club President's Role: my.rotary.org/en/learning-reference/learn-role/president

Rotary Brand Center: brandcenter.rotary.org

Resource Libraries: rizoness33-34.org

District Governor and Assistant Governor

District Committee Chairs

Notes & follow-up:



MAKING THE MOST OF ROTARY'S PUBLIC IMAGE

Learning Objectives

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

1. Understand the purpose and intent of implementing a Public Image plan for your Rotary Club
2. Understand Rotary branding guidelines, use of the Rotary logo and resources available at the brandcenter.rotary.org
3. Share proven strategies, ideas and best practices to enhance the club's (and Rotary's) Public Image
4. Collaborate with peers on leveraging Social Media as part of Public Image plans throughout the year
5. Understand and incorporate Rotary's Vision Statement and our Seven Causes into the club's public image strategies
6. Design your communications plan

Notes & follow-up:

MAKING THE MOST OF ROTARY'S PUBLIC IMAGE

YOUR ROTARY STORY



What will you say when someone asks, “What is Rotary?” How will you convey in your own words how Rotary helps you to UNITE LEADERS, EXCHANGE IDEAS, and TAKE ACTION? Use this exercise with your club members!

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

Why did you **join** Rotary?

-
-
-
-
-

Why have you **stayed** with Rotary?

-
-
-
-
-

The answers to these questions become **YOUR Rotary Story**. Be sure to tell compelling stories about how your club or district is making a difference! Strengthening your public image can help you attract people to your club, form new partnerships for service, and build a stronger & more diverse network of collaborators.

MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

PUBLIC IMAGE STRATEGIES

Which of these "best practices" are part of your club's Public Image plan?

- Establish a **Public Image Committee** and **Public Image Action Plan**
- Attend District Public Image Training opportunities and encourage your Public Image committee members to take RI Learning Center courses
- Review all club collateral for correct use of the Rotary logo and club logo
- Review all online presence -- website, social media, blogs, etc. for correct logos and branding -- redesign as needed
- Establish a website and social media presence, if not already in place
- Prominently display the Rotary logo during service projects & events
- Use the **People of Action** materials & other resources in the Brand Center
- Post and TAG service project photos
- Budget for "**Rotarian at Work**" shirts for hands-on projects
- Engage local media with news releases and video posts
- Prioritize attracting members as an objective of your Public Image plan

IMPORTANT: Highlight Program Speakers Using Social Media

- A few days prior to your club meeting, post about and TAG your speaker
- 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 also
- What does this do?
 - It spreads the information out far beyond 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

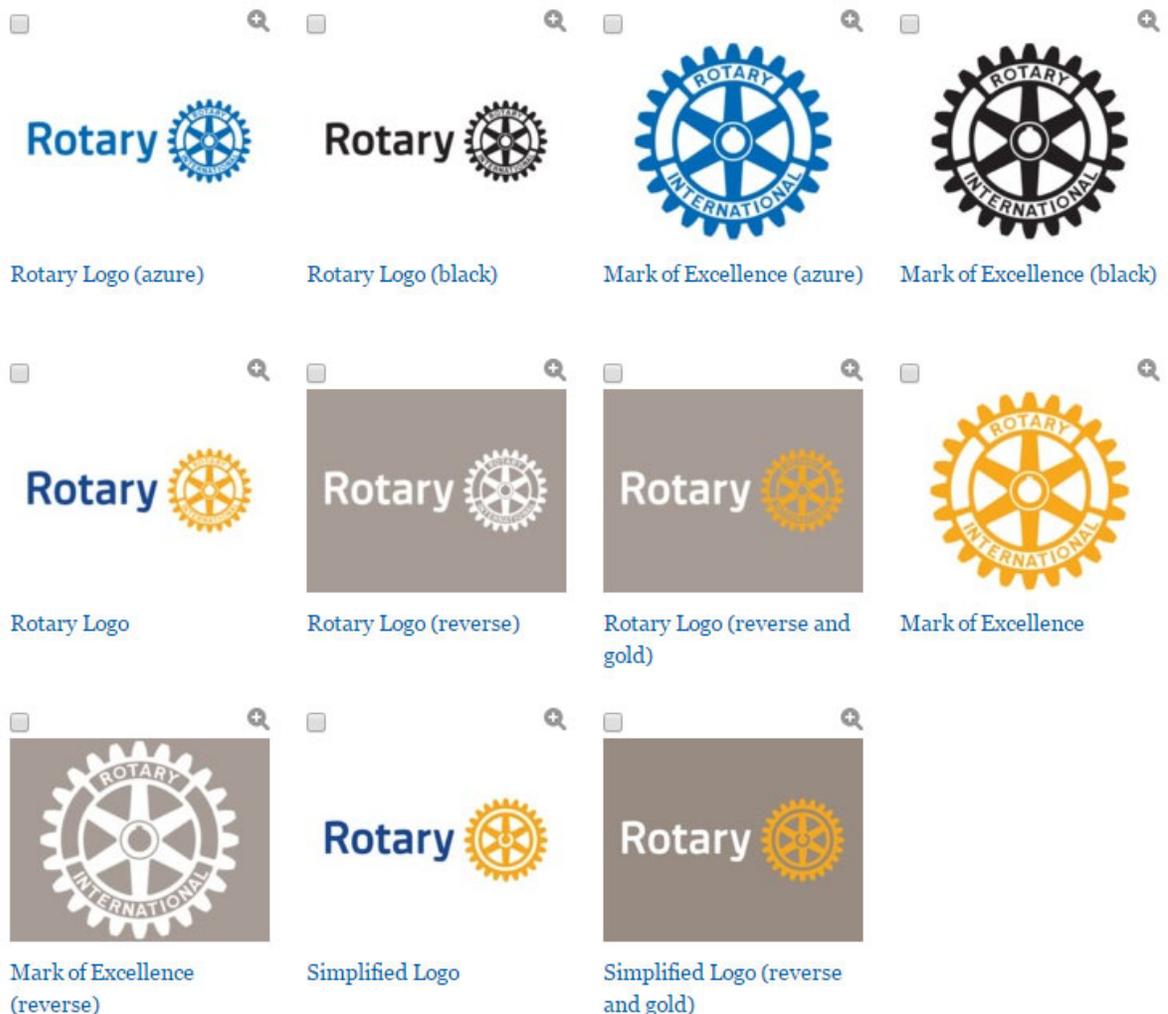
Rotary Branding:

1. Tell your story in ways that help people understand what Rotary does, how we are different, and why our work matters!
2. Use the "Masterbrand" logo -- the word "Rotary" alongside a gold wheel (samples below)
3. Create a Club Logo using the template in the Brand Center
4. Use the published guidelines



Rotary Logos are available in many formats from MyRotary's Brand Center

brandcenter.rotary.org





MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

The VISION of Rotary ~ “Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves”

Uniting, Taking Action, Creating Lasting Change ... has many forms



The Rotary Foundation's flagship project



Ending polio forever

Rotary has been working to eradicate polio for over 30 years, and our goal of ridding the earth of this disease is in sight. We started in 1979 with vaccinations for 6 million children in the Philippines. Today, Afghanistan, Nigeria, and Pakistan are the only countries where polio remains endemic.

[Help us in the final push.](#)



MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

The Rotary Foundation's Seven Causes



Promoting Peace



Supporting Mothers and Children



Fighting Disease



Growing Local Economies



Providing Clean Water



Protecting the Environment



Supporting Education



MAKING THE MOST OF ROTARY'S PUBLIC IMAGE, continued

Great brands build their stories around simple ideas. The three phrases below convey the essence of who we are and help us tell our story with strength and consistency. They communicate what makes Rotary a positive force in communities all over the world.

ROTARY UNITES LEADERS

- Rotary brings together leaders who use their combined expertise to tackle some of the toughest challenges in their communities
- Rotary harnesses the strength and experience of professional and community leaders from nearly every country in the world

ROTARY EXCHANGES IDEAS

- At Rotary, we discover & celebrate our diverse perspectives & experiences during club meetings, conferences, service projects, and social events
- Rotary finds a place for your expertise and passion. Whether you want to lead a project or participate in one, Rotary welcomes equal opportunities for fellowship and service.

ROTARY TAKES ACTION

- Rotary creates positive change in communities around the world through our service projects
- From stocking food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out impactful and sustainable projects in communities around the world

THROUGH ROTARY

- We build lifelong relationships
- We honor our commitments
- We connect diverse perspectives and populations
- We apply our leadership and expertise to address social issues



WHAT IS THE COMMUNICATIONS PLAN?



WHAT DO WE WANT TO ACCOMPLISH?

-  **EXPAND REACH ~ # OF DISTRICTS WITH PUBLIC IMAGE CHAIRS WHO CAN AMPLIFY RESOURCES AND MESSAGES**
-  **EQUIP CLUBS ~ # OF CLUBS WITH PUBLIC IMAGE CHAIRS**
-  **ONE VOICE ~ # OF CLUBS WITH BRAND COMPLIANT WEBSITES**
-  **TELL THE STORY ~ # OF CLUBS ENGAGED IN LOCAL PUBLIC FACING EVENTS**

RESOURCES

Rotary Brand Center: brandcenter.rotary.org

End Polio Now: EndPolioNow.org

Club Public Image Committee: learn.rotary.org

Public Relations page on My Rotary

Club Public Image Committee & District Public Image Committee

Rotary Public Image Coordinator (RPIC) & their Assistants

Notes & follow-up:



ENGAGING YOUR COMMUNITY

Learning Objectives

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

1. Understand that Rotary is a “membership organization” and that service is our business
2. Determine a balanced program of service for the club
3. Understand the difference between a fundraising project and the service project(s) it funds
4. Understand the role and importance of YOUR leadership and commitment in your club’s service projects
5. Understand the importance of periodically evaluating every club project
6. Identify the “best practices” of successful & effective club projects and identify the ingredients of an effective community-building service project that helps to tell Rotary’s story

Notes & follow-up:



ENGAGING YOUR COMMUNITY, continued

KEY POINTS

- We are “**People of Action**” — We identify needs in our communities, create solutions, then provide funding and execute service projects
- We are a Membership Organization first & foremost and our “business” is service -- thus ***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 plus fellowship
- Effective, meaningful service projects are essential to attracting and retaining Rotarians
- Service projects are a part of your club’s public image plan as well as the public 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. Note that projects repeated for many years can lose effectiveness and community impact.
- Develop a plan to ensure the club’s service projects will be meaningful and successful
- Implement each project to deliver the service effectively and create impact
- 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 to post-project review
 - Does the need for the project still exist?
 - Are members still passionate about the project?
 - Who/what would be harmed if we dropped or reinvented the project?

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 vibrant 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.

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.

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

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.

ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant but thriving!



ENGAGING YOUR COMMUNITY, continued

RESOURCES

MyRotary → Take Action → Develop Projects → Lifecycle of a Project

MyRotary → Learning & Reference → Developing Effective Projects

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

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

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

Rotary Learning Center — Service Courses

District Community Service Chair

Assistant Governor

Notes & follow-up:

YOUR ROTARY FOUNDATION

Learning Objectives

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

1. Identify the seven Causes of Rotary Foundation and how they relate to Rotary Foundation grants
2. Understand how your club can benefit from District Grants and participate in Global Grants
3. Identify the “best practices” of clubs that successfully grow member support and contributions to The Rotary Foundation
4. Understand how to use historical club contribution data to set reasonable goals for both Annual Fund and PolioPlus fundraising
5. Understand how to use available informational and District resources to educate members on The Rotary Foundation’s goals, accomplishments and to value our charity as their “charity of choice”

Notes & follow-up:



YOUR ROTARY FOUNDATION, continued

The Rotary Foundation's Mission Statement:

... to enable Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment and the alleviating poverty

YOUR Rotary Foundation has seven specific Causes:

Promoting Peace

Fighting Disease

Providing Clean Water, Sanitation, and Hygiene

Saving Mothers and Children

Supporting Education

Growing Local Economies

Protecting the Environment

YOUR ROTARY FOUNDATION, continued

What are the big differences between The Rotary Foundation and other charitable foundations?

The Rotary Foundation is dedicated to causes that build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever.

The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.

Grants from the Rotary Foundation are initiated by:

- A Rotarian who sees a community need and creates a solution
- A Rotary club that supports the project
- Rotarians who agree to execute the project
- Then,
- The Rotary Foundation funds the project
- The Rotarians monitor, evaluate, and report on the project
- Grants from The Rotary Foundation are initiated and directed by Rotarians, Rotary clubs and Rotary Districts. Therefore:
- You know where your contributions are going
- Rotarians “have your back” on the project (monitoring, evaluation)
- Required reporting ensures funds are spent as intended

Clubs' and Districts' grant eligibility and available funding is based on their club members' contributions to The Rotary Foundation

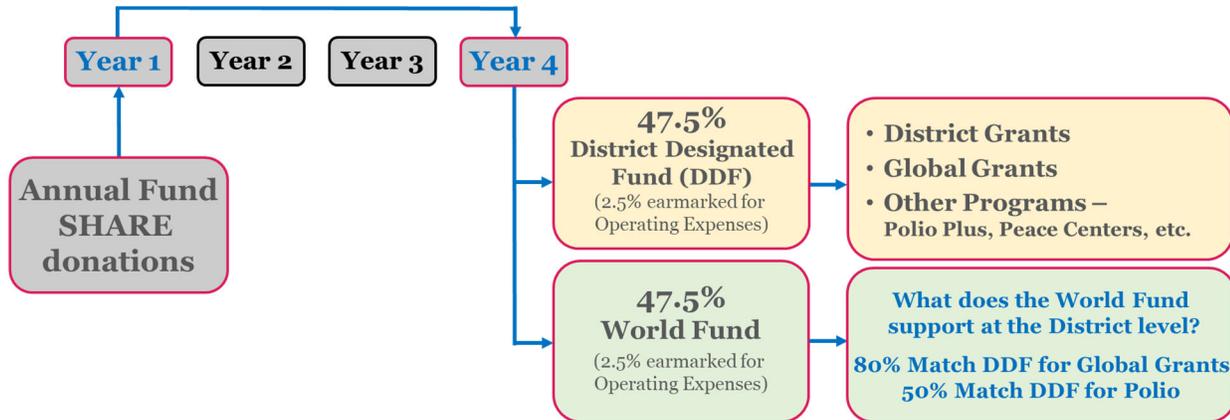
What kinds of grants are available from The Rotary Foundation?

- District Grants
- Global Grants

YOUR ROTARY FOUNDATION, continued

How are District and Global Grants funded by Rotarians' contributions?

Below a visual of the Annual Fund – Share System



Ideas for my club's District Grant requests:



YOUR ROTARY FOUNDATION, continued

District Grants - Characteristics and guidelines

- **IMPORTANT:** District grants for your term as President will be made BEFORE July 1. Get a grant application underway ASAP if not already in process
- Awarded to your club by your District's Grants Committee, based on District guidelines (get with your District Foundation Chair soon to learn more)
- Simple, flexible, innovative
- Small-scale, short-term (<1 year)
- Awarded annually by your District
- Administered by your District

District Grants - Requirements

- Clubs may spend the money and start the project only AFTER receiving grant funds
- Provide a project report, including use of funds
- Provide receipts for expenditures

Global Grants - Characteristics and guidelines

- Longer-term projects in partnership with clubs and districts in other countries
- Align with one or more of the Seven Causes
- Active Rotarian participation by in-country (receiving) Rotary clubs
- \$30,000 minimum budget
- Sustainable and measurable outcomes

NOTE: Global Grants can be (and are) made in the US, supported by a District outside the US. A sufficiently "big idea" is needed to meet the criteria above.



YOUR ROTARY FOUNDATION, continued

Promoting The Rotary Foundation in your club

- Identify a committed member as the club Foundation Chair
 - Select committee members who have supported the Foundation
- **Lead** by example — attend and encourage attendance at your district Rotary Foundation seminars and other related events
- **Lead** by contributing personally and encourage your Board of Directors to do likewise
- Promote contributions from club members
 - Include recommended Sustaining Member contribution (\$100/year) on dues invoice
 - Paul Harris Level Point Match offers
 - Rotary Direct — Regular contributions via bank draft or credit card
- Plan educational and inspirational club programs focused on The Rotary Foundation every quarter (especially in November, Rotary Foundation Month)
- Utilize District Rotary Foundation resources for support
- Set club contribution goals and track them in Rotary Club Central
- Available Reports:
 - **Monthly Contribution Report** (overall club progress)
 - **Club Recognition Summary** (Individual giving)

My club's strategies for promoting contributions to The Rotary Foundation:

YOUR ROTARY FOUNDATION, continued

Donor Recognition Levels

Paul Harris Fellow (PHF)	\$1,000 lifetime contribution
Sustaining Member	\$100 year
Paul Harris Society	\$1,000/year
Multiple Paul Harris Fellow	\$1,000 add'l increments: PHF+1, PHF+2, etc
Major Donor	\$10,000 lifetime contribution (Level 1) \$25,000 (Level 2) \$50,000 (Level 3) \$100,000 (Level 4)
Arch Klumph Society	\$250,000 minimum (multiple levels)

Club Banner Recognition Levels

100% Foundation Giving Club

Everyone > \$25 to Annual Fund, PolioPlus Fund, approved global grants, or Endowment Fund

and club Per Capita > \$100

Every Rotarian, Every Year Club

Everyone > \$25 to Annual Fund

and club Per Capita > \$100

100% Paul Harris Fellow – All members are Paul Harris Fellows (one time)

Estate Pledge (Bequest) Levels

Benefactor	\$1,000 Estate pledge
Bequest Society	\$10,000 Estate pledge (Level 1) \$25,000 Estate pledge (Level 2) \$50,000 Estate pledge (Level 3) \$100,000 Estate pledge (Level 4) \$250,000 Estate pledge (Level 5)

YOUR ROTARY FOUNDATION, continued

Goal Setting — Annual Fund

All necessary data for the goal-setting process described below is available from My Rotary – TRF Giving Reports

- Consider the club's historical giving levels
 - Per capita Annual Fund (based on July 1 membership)
 - Total Giving (based on Rotary year)
- If your club's per capita giving is below the District average:
 - Set your goal at the District average OR
 - Close the gap by half
- If your club's per capita giving exceeds the District average:
 - Take the best of your past five years' per capita and beat it by \$1.
 - Your club's Total Giving goal for the Annual Fund is the per capita goal times your estimated July 1 membership

Goal Setting — PolioPlus

Your club's PolioPlus contribution history is also available on My Rotary – TRF Giving Reports

- Consider the club's historical giving levels
 - Per capita (based on July 1 membership)
 - Total Giving (based on Rotary year)
 - Take the best of your past five years' per capita contributions and beat it by \$1.
- Your club's Total Giving goal for PolioPlus is the per capita goal times your estimated July 1 membership



MEMBERSHIP ENGAGEMENT AND DEVELOPMENT

Learning Objectives

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

1. Understand the relationships between Retention, Attrition and Attraction Rates to establish membership goals
2. Understand the Key Success Factors of membership growth:
 - Prospect Identification (Lead Generation)
 - Attraction Methods
 - Onboarding New Members
 - Engaging All Members
 - Retaining Members
3. Identify one or more Intentional Strategies to accomplish each of the Key Success Factors
4. Recognize the importance of empowering youth and young professionals through leadership development programs
5. Share proven “best membership practices” for communicating with and engaging potential, new, and current members
6. Leave Carolinas’ PETS with the framework of an effective Membership Action Plan for your club

Notes:



MEMBERSHIP ENGAGEMENT AND DEVELOPMENT, continued

The Benefits of Being a Member of Rotary!

- A high quality, high integrity network of like-minded people
- Opportunity to serve your own community and others worldwide
- Part of something bigger than yourself
- Personal growth & development, particularly in leadership skills
- Outstanding programs from high-impact speakers
- Mentoring youth or younger members or being mentored yourself
- Supporting our charity of choice ~ The Rotary Foundation

An Effective Rotary Club is One That:

- Prioritizes the member experience
- Enhances participant engagement
- Implements successful projects that address the needs of its community and communities in other countries
- Embraces diversity, equity, and inclusion for fellowship
- Supports The Rotary Foundation through both program participation and financial contributions
- Develops future club leaders capable of serving Rotary beyond the club
- Offers new experiences and professional development opportunities



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



MEMBERSHIP ENGAGEMENT AND DEVELOPMENT, continued

ROTARY IS A MEMBERSHIP ORGANIZATION AND OUR BUSINESS IS SERVICE!

Membership Goal Setting Worksheet

This worksheet will help you set your membership growth goals and calculate the number of new members needed to reach your goal. **Be intentional and focus on Attrition & Attraction!**

My club's Annual Attrition Rate (3-year average) _____%

My club's Annual Attraction Rate (3-year average) _____%

My club's Annual Net Growth Rate _____%

Success targets include:

- **Attrition less than 15% (July 1 membership x .15)**
- **Attraction greater than 20% (July 1 membership x .20)**

The problem we need to solve is:

___ Low Retention (Attrition Rate exceeds 15%)

___ Insufficient New Member Attraction (Attraction Rate is lower than our Attrition Rate or Below 20%)

___ Neither ~ we need to build on our current membership growth culture and strategies

Actual Club Data can be researched at: RIZones33-34.org/Zone33MGI (find your District/Club)

Membership History:

Club Year Members at start of year (July 1)

2024-25 _____

2023-24 _____

2022-23 _____

2021-22 _____

2020-21 _____

2026-2027 Membership Goal Setting:

Starting Membership July 1, 2025 _____

Current Membership Jan. 5, 2026 _____

Estimated Membership July 1, 2026 _____ a

*Membership Goal July 1, 2027 _____ b

Net growth (b-a=c) _____ c

Average Annual Attrition to Replace _____ d

New Members Needed (c+d) _____ *



MEMBERSHIP ENGAGEMENT AND DEVELOPMENT, continued

Five Things To Note About Membership

1. **Nothing Else Matters** — Rotary is a Membership Organization And Our Business is Service — Work on membership first, get your membership committee up and running and then attend to other priorities. Make sure your membership chair is 100% committed to membership growth, and to getting started NOW before the next Rotary year, and that the Membership Chair has a committee.
2. **Attrition is Real** — Membership organizations lose members. Half of those leave for reasons you can't control. Build your membership plan around the assumption that 15% of your members will leave during this next Rotary year and have a plan to replace them. Count your blessings (and your membership gain) if that doesn't happen.
3. **Retention is Important for the LONG Term** — Retention rates can be changed over time, not quickly. Work on retention strategies, but don't count on moving the needle quickly. Find out why people leave through exit surveys and fix those problems. Hint: Most attrition casualties have been members less than 1, 2 or 3 years (<1 year = highest attrition). Focus your retention strategies on those members.
4. **Clubs need membership growth every year** — It doesn't have to be dramatic. What you want to develop is a membership growth culture -- the fundamental belief that the club grows a little every year and avoids huge declines along the way. It's not a series of "membership drives", but a consistent, sustained effort. Set your goal at 10% net membership growth (plus an estimate of 15% attrition).
5. **It takes Intentional Strategies** — Discard generalities like, "Ask members to bring guests to meetings". Change that to, "Ask "x" members to bring "y" guests to a meeting about Rotary membership on mm/dd and plan for reminders, follow up, etc. Financial and other incentives for membership attraction are surprisingly ineffective.

Remember the 10:3:1 Rule -- It takes about 10 names or referrals (suspects) to get 3 prospects to a Rotary Information Hour or Rotary club meeting, to get 1 new member proposal. Lack of sufficient "lead generation" is a root cause of low rates of new member flow. If you understand and believe these truths, your year as President will be successful, rewarding and perhaps legendary in the life of your club.

MEMBERSHIP ENGAGEMENT AND DEVELOPMENT, continued

INTENTIONAL MEMBERSHIP STRATEGIES

Prospect Identification (Lead Generation)

Use the *Who do You Know?* handout at a Club Assembly. Allow time for people to fill it out (making it clear we're not leaving 'till everyone has some names written down) and then ask them to approach ten of those people about Rotary.

Classification/Profession Gap Analysis — Secure a list of local businesses and professions from the Chamber of Commerce. Identify businesses and professions that are missing in the club. Present the list at a Club Assembly and ask which members know someone at each and who will invite them to an upcoming Rotary Information Hour.

Attraction Methods

Club President personally asks each member to bring a new member into the club – an in-person conversation over breakfast, lunch, coffee, adult beverage or a two-way telephone conversation. Takes the anonymity out of the ask. “Can I count on you doing this not only for the club but also for me?”

A regularly scheduled “**Rotary Information Hour**” once a quarter or once a month. The “intentional” part is that it’s a standing event, on the club calendar, and members are reminded by email or phone to bring their prospective members. Not just to a meeting whenever you think of it, but to a regularly scheduled date, time and place.

“**Drip Marketing**” -- Create a central prospect list, including email addresses, and use the “Potential Member” feature in DaCdb or another email distribution mechanism (Vertical Response, Constant Contact or MailChimp), to send your club’s E-Bulletin once or twice a month to your entire prospect list. Regularly reminding prospects of your club’s brand makes you “Top of Mind” when the time is right for the prospect to join a community service organization. Be sure and include “Response” information so they know how to raise their hands when they’re ready.

#1 PROVEN ROI Strategy

MEMBERSHIP ENGAGEMENT AND DEVELOPMENT, continued

INTENTIONAL MEMBERSHIP STRATEGIES, continued

Take advantage of membership flexibilities, such as:

- a. Create Passport club(s) that allow members to attend other club meetings as long as they attend a specified number of the home club each year
- b. Create a young professional category that reduces the cost of dues
- c. Create Satellite club(s) for groups of members that have a different need or focus from the traditional club
- d. Get creative. Allow members to unite to address a particular cause
myrotary/en/club-flexibility

Onboarding New Members

Appoint a Club Learning Coordinator and create a New Member Orientation program an to engage members immediately with your club. Create a mentorship plan to focus on connections and involvement.

Engaging All Members

Determine every member's passion in Rotary and assign each member to a committee of their choice. Encourage all members to learn more about Rotary, especially in those areas of each person's interest.

Retaining Members

Offer Professional & Leadership Development opportunities— Provide opportunities for each member to take part in Rotary meetings, projects, fund-raisers, district events and training. Support members' vocational growth.

Meaningful Service Projects — The bottom line of engaging and retaining members is for the club to do meaningful, **Rotary-branded** service projects. Hands-on, shoulder-to-shoulder service work is where members get to know and bond with each other.

Upgrade Programs — Clubs have proven that the club experience is what attracts and keeps members. Programs need to be informative, educational, and inspirational.

MEMBERSHIP ENGAGEMENT AND DEVELOPMENT, continued

Membership Action Plan:

Evaluate

Current Membership is _____ members Average Annual Attrition is _____ members

Membership Goal -- Grow by _____ members (net), requiring _____ new members (Refer to page 34)

Our Membership Challenges -- What are the membership challenges facing our club?

- High Attrition rate? Low Attraction Rate? Maintaining existing growth momentum?

Actual Club Data at: RIZones33-34.org/Zone33MGI (find your District/Club)

Take the **Rotary Club Health Check** and **Diversity Assessment** in the Learning Center to address areas that need attention. Discover new ideas or practices in **Be a Vibrant Club**.

Create a Vision

Conduct the 3-Year Succession Plan outlined in the Effective Leadership Course on page 3 so that this membership plan aligns with it. Conduct a club assembly to complete the visioning process so that all members are included.

Attract New Members

Refer to Prospect Identification ideas to inspire members to think of prospects & invite them – page 36. How will we make our club attractive and tell the Rotary stories?

Engage All Members

Improve the member experience and make your service projects more compelling. What are methods to keep everyone connected? How do we ensure that all members understand Rotary, our club, and expectations? How does the club embrace Public Image efforts to promote awareness in the community?

Support Your Club

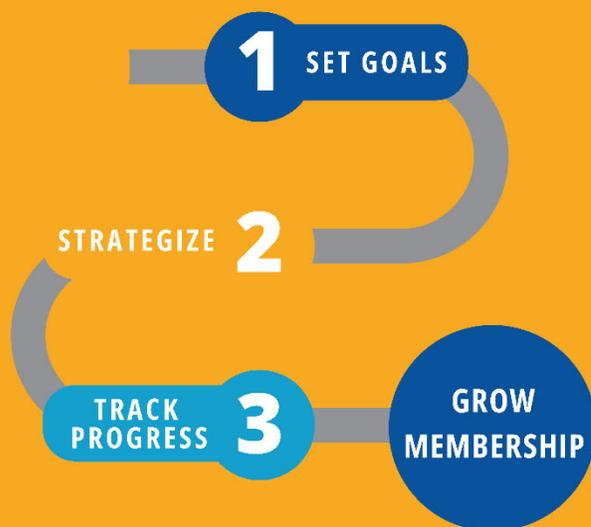
Identify your Membership Chair and committee immediately to move forward with your club's Membership Action Plan. See next page...



Membership Action Plan: Treasure Chest of Tools Await You

MEMBERSHIP SUCCESS CENTER

The Roadmap to Club Membership Growth



The Rotary Zones 33/34 **Membership Action Plan (MAP)** is a multi-year approach to creating a membership **culture** that will result in consistent, moderate membership **growth**.

Rotary
Zones 33/34



Membership
Action
Plan

In 2007, the Odyssey Marine Exploration salvage team found the largest ever monetary treasure haul off the coast of Gibraltar with more than 17 tons of coins valued at approximately 500 million dollars.

Zones 33 and 34 leadership have found our own treasure haul. We have a treasure chest of membership tools contained in the Membership Action Plan (MAP). These cutting-edge tools will help your clubs **GROW MORE TO DO MORE**.

1) **Membership Success Center** – Provides a treasure trove of club membership information. By clicking on the District Tab labeled MAPSys on DACdb, you will see comprehensive club data and links to address club challenges all at your fingertips!

2) **Monthly MAP Webinars** – On the 2nd Monday of each month, the MAP team provides exciting and informative 45 minute sessions on Rotary Membership topics! These “bite-size” webinars feature tips and strategies from top performing clubs across 34 Districts.

3) To assist you in accessing and using these resources, we have created the MAP Ambassador Team. These membership leaders are trained to assist you in getting connected to the valuable tools right away. Reach out to MAP Ambassador team members or District leaders for assistance.

The Membership Action Plan is created to assist **YOU AND YOUR MEMBERSHIP TEAM** deliver The Magic of Rotary.



**FIND ALL OF THE
ABOVE DESCRIBED
TREASURE HERE!**





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Rotary Carolinas' PETS



Arden, Asheville, Asheville Breakfast, Asheville-Biltmore, Asheville-Metro, Asheville-South, Asheville-West, Assistant Governor, 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, Discussion Leader, District Governor 2022-2023, District Governor 2023-2024, District Governor 2024-2025, District

Secretary, 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, Morganton, Murphy, Newton-Conover, PETS Staff, Pisgah Forest, Sherrills Ford-Terrell, Spruce Pine, Sylva, Tryon, Valdese, Waynesville, Waynesville-Sunrise, Albemarle, Alleghany County, Alleghany County Evening, Ashe County, Ballantyne, Belmont, Boiling Springs Area, Cabarrus County, Charlotte, Charlotte Dilworth South End, Charlotte International, Charlotte North, Charlotte Providence, Charlotte South, Charlotte South Park, Charlotte West, Cherryville, China Grove, Concord, Concord Afton-Sunset, Davidson, Gastonia, Gastonia East, Gastonia Evening, Greater Statesville, 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, The Queen City, Top of the Lake-Mooresville, Troutman, Union West (Indian Trail), Wadesboro, Waxhaw-Weddington, West Stanly, Alamance (Burlington), Archdale-Trinity, Asheboro, Burlington, Carthage, Clemmons, Crescent, East Greensboro, Eden, Furnitureland, Gate City, Global Trekkers, Graham, Greensboro, Greensboro Airport, Guilford, High Point, Jamestown, Jonesboro, Kernersville, King, Lexington, Liberty, Madison-Mayodan, Mebane, Midstate, Mocksville, Mount Airy, Pinehurst, Pittsboro, Randolph, Reidsville, Reynolda, Sandhills, Sanford, Siler City, Southern Guilford, Southern Pines, Stoneville, Stratford, Summit, Surry Sunrise, Thomasville, Troy, 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, East Chapel Hill, E-Club of D7710, Fuquay-Varina, Fuquay-Varina Downtown, Garner, Garner Mid-Day, Henderson, Hillsborough, Holly Springs, Knightdale, Lillington, Morrisville, North Raleigh, Oxford, Raleigh, Raleigh Midtown, Raleigh/Cary 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, New Bern, New Bern-Breakfast, North Banks (Kill Devil Hills), Oriental, Roanoke Rapids, Rocky Mount, Tarboro, Vanceboro, Washington, Washington (Noon), Williamston, Wilson, Windsor, Beaufort-Ole Towne, Bladenboro, Burgaw, Clinton, Clinton-Sampson County, Coastal Pender, District Governor 2022-2023, Duplin, Elizabethtown, Fair Bluff, Fairmont, Fayetteville, Jacksonville, Jacksonville Breakfast, Jacksonville South, Kinston, La Grange, Laurinburg, Leland Area, Liberty Point, Lumberton, Maysville, Morehead City, Morehead City After Hours, Morehead City Navigators, Morehead City-Lookout, Morehead City-Noon, Morehead City-Soundview, New River (Onslow County), Newport, Passport, Pollockville, Red Springs, Richlands, Shallotte, Sneads Ferry, South Brunswick Islands, Southport, Southport Evening, Surf City, Swansboro, 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, District Administrator, District Trainer, Easley, E-Club of the Carolinas, Emerald City, Fort Mill, Fountain Inn, Gaffney, Golden Strip Sunrise, Greater Anderson, Greenville, Greenville Breakfast, Greenville City Center, Greenwood, Guest of District Governor, Indian Land, Indian Land Lunch, Inman, Lake Wylie, Lancaster, Lancaster Breakfast, Laurens, Mauldin, Newberry, North Augusta, North Spartanburg, Pickens, Pleasantburg, Reedy River Greenville, Rock Hill, Seneca, Seneca Golden Corner, Simpsonville, Spartan West, Spartanburg, The Foothills, Travelers Rest, Twin City Batesburg-Leesville, Union, Walhalla, Westminster, Winnsboro, York, Manning [SC], Rumford - River Valley [ME], Exhibitor, Guest Speaker, RI Director, RI Past Director, RI Past Vice President, RI Staff - Club & District Support, RI Staff - Membership Officer, RI Staff - Rotary Foundation, RI Staff - Service & Engagement, Rotary Coordinator, Rotary Foundation Alumni, Rotary Public Image Coordinator, Rotary Regional Foundation Coordinator, Rotary Regional Membership Coordinator, Sergeant-At-Arms, Vendors