



# REGIONAL LEADER'S MANUAL

# CONTENTS

---

<b>1) KEY RELATIONSHIPS</b> .....	<b>3</b>
▪ Working With Rotary Senior Leaders	
▪ Working With Other Regional Leaders	
▪ Working With Districts	
▪ Your Team	
<b>2) PRIORITIES AND GOALS</b> .....	<b>8</b>
▪ Understanding Your Goals	
▪ Developing an Action Plan	
▪ Reporting Your Progress	
<b>3) REGIONAL ROTARY FOUNDATION COORDINATOR</b> .....	<b>10</b>
▪ Responsibilities	
▪ Your Areas of Expertise	
<b>4) ROTARY COORDINATOR</b> .....	<b>17</b>
▪ Responsibilities	
▪ Your Areas of Expertise	
<b>5) ROTARY PUBLIC IMAGE COORDINATOR</b> .....	<b>23</b>
▪ Responsibilities	
▪ Your Areas of Expertise	
<b>6) ENDOWMENT/MAJOR GIFTS ADVISER</b> .....	<b>27</b>
▪ Responsibilities	
▪ Your Areas of Expertise	
<b>7) TRAINING</b> .....	<b>32</b>
▪ Regional Rotary Seminars	
▪ Governors-elect Training Seminar and Rotary Institutes	
▪ Presidents-elect Training Seminar	
▪ Training Your Team	
▪ Distance Training and E-Learning	
<b>8) RESOURCES</b> .....	<b>35</b>
<b>9) COMMUNICATION</b> .....	<b>37</b>
▪ Telling Rotary's Story	
▪ Creating Your Communication Plan	
▪ Communication Channels	
▪ Rotary Communications and Tools	
<b>10) BUDGET</b> .....	<b>40</b>
<b>Appendix 1: PLANNING CALENDAR</b> .....	<b>43</b>
<b>Appendix 2: TRAINING SEMINARS</b> .....	<b>50</b>

Congratulations on your appointment as one of Rotary's regional leaders. You have a significant, challenging, and potentially rewarding assignment to serve as a Rotary expert and resource. You'll also be a vital link, not only between Rotarians at the club, district, and regional levels, but also between Rotarians and Rotary staff. This manual is designed to help you better understand your responsibilities.

## Comments?

We welcome your comments, suggestions, and questions. Direct them to your staff specialist:

Regional Leader Support  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698  
USA

### **Regional Rotary Foundation coordinators**

Melanie Davis  
Email: [rrfc@rotary.org](mailto:rrfc@rotary.org)  
Phone: +1-847-866-4451

### **Rotary coordinators**

Nora Beamish-Lannon  
Email: [rc@rotary.org](mailto:rc@rotary.org)  
Phone: +1-847-866-3836

### **Rotary public image coordinators**

Conner Fitzpatrick  
Email: [rpic@rotary.org](mailto:rpic@rotary.org)  
Phone: +1-847-866-3369

### **Endowment/major gifts advisers**

Stephanie Norton  
Email: [emga@rotary.org](mailto:emga@rotary.org)  
Phone: +1-847-866-3050

## 1. KEY RELATIONSHIPS

---

You'll work closely with Rotary International directors, Rotary Foundation trustees, district leaders, and fellow regional leaders. It's important to plan together and communicate regularly to maximize your knowledge, skills, and resources, as well as to prevent duplicated efforts.

### **Regional Rotary Foundation coordinators**

RRFCs serve as a key resource on all Foundation matters. As consultants in their regions, RRFCs can help promote the Foundation, including its programs and fundraising initiatives, as well as set and achieve program, grant, and giving goals.

### **Rotary coordinators**

RCs provide expertise and support to encourage membership growth and strengthen clubs. As consultants in their regions, RCs work with district leaders to identify and address membership challenges and to build stronger clubs.

### **Rotary public image coordinators**

RPICs serve as communications and public image resources. As consultants, they help implement Rotary's voice and visual identity, reach out to regional media, publicize events, and generally raise awareness of Rotary. RPICs may have career experience in public relations, journalism, or communications.

### **Endowment/major gifts advisers**

E/MGAs are a valuable resource in all major gift and endowment matters in their regions. As consultants, they work closely with other Rotary leaders and staff to develop personalized plans for cultivating and soliciting major gifts and to plan events for cultivating and recognizing Foundation supporters.

## **Working With Rotary Senior Leaders**

### **Directors**

Each RRFC, RC, and RPIC is expected to confer and cooperate with the region's RI director. The director's role is to facilitate the joint activities of the regional leaders, including E/MGAs and End Polio Now zone coordinators. These activities are vital to achieving the goals of Rotary International and The Rotary Foundation. Your region's director can also help identify the greatest regional needs, choose your assistant coordinators, set goals and monitor progress, and develop strategies for effective public relations and membership efforts.

## **Trustees**

RRFCs and E/MGAs report to the trustee chair and confer and cooperate with the trustees in their regions. RRFCs and E/MGAs consult with trustees on local matters, such as stewardship or grant issues. Trustees can also help identify and address regional needs, suggest candidates for assistant coordinators, set goals and monitor progress, and develop strategies to boost engagement in Foundation programs and secure gifts to The Rotary Foundation.

## **Working With Other Regional Leaders**

The regional leader team — the RRFC, RC, RPIC, and E/MGA, as well as the End Polio Now zone coordinator (EPNZC) as appropriate — supports the interrelated priorities of Rotary's strategic plan and promotes Rotary's core values.

When working with your team, consider these strategies:

- Create a plan for strengthening clubs, promoting support of The Rotary Foundation, increasing the number of successful projects, and enhancing Rotary's public image.
- Collaborate on your region's specific communications.
- Hold regional seminars for district leaders (see your Regional Leaders Workgroup for sample agenda), where appropriate.
- Participate in the regional leader booth at the Rotary International Convention.
- Contact district governors-elect and other district leaders, introducing yourself and your fellow team members as resources and experts available to help them.
- Distribute joint communications for Rotarians in the region.
- Plan and hold joint webinars for club and district leaders.
- Participate in club and district training events, including governors-elect training seminars (GETS).
- Use updated and new resources in the Document Center and Brand Center.

Drawing on the expertise of your fellow regional leaders and developing these key relationships will contribute to a successful year.

## **Working With Districts**

Regional leaders and their teams work with district leaders to help clubs succeed. You connect district officers with Rotary resources. You serve as motivators and consultants year-round, and as trainers at Rotary institutes, GETS, and regional and district seminars. You may also be invited to train or present directly to club leaders at a presidents-elect training seminar (PETS) or other club-level meetings.

### **Supporting districts**

One critical goal for you and your fellow regional leaders is to work through districts to support clubs. Strong clubs are crucial to membership, public image, and Foundation giving and programs. You can help lead change at the club level by working through district leaders. RRFCs, RCs, and RPICs have a team of assistants to help them work closely with district leaders.

E/MGAs work directly with district leaders to identify Rotarians interested in learning more about major gifts. You can also use distance learning technology to extend your reach.

Your predecessor is an invaluable resource in tailoring your work with districts. He or she can offer knowledge of districts' past successes and challenges. Meet with your predecessor and your district leaders and continue work on plans already in place.

### **District leaders**

Supporting district leaders is crucial to your success as a regional leader. Consider your district leaders as your primary audience. You will likely communicate all messages intended for club leaders through them. If you do work directly with clubs, check with their district governors first to coordinate your efforts.

When working with districts, consider these best practices:

- Envision the kind of support you would have appreciated from a regional leader when you were a district governor and use that to promote your relationship with governors.
- Determine the best way to communicate regularly. For example, set up monthly phone calls or group video chats to discuss collaborative tasks with shared responsibilities.
- Study trends and use reports to assess and improve your region.
- Attend training events such as governors-elect training seminars, where you can introduce yourself to district governors and leaders from your region.
- Give tailored presentations that develop effective public relations efforts and engage both internal and external audiences; encourage strong support for The Rotary Foundation; and inspire clubs to become more vibrant and engaging.

Emphasize how increasing and diversifying our membership results in more vibrant clubs, more to show the world and more resources and opportunities for humanitarian service.

Communicate regularly with all district leaders to support their progress toward their goals. Some examples of communication methods to use are included in the "Communication" section of this manual. Encourage them to come to you for resources and with questions, and explain the benefits of your regional initiatives.

District committee chairs can help you implement districtwide initiatives in specific areas. For example, you can work with:

- Membership development chairs to follow up on [Membership Leads](#) and implement any regional membership initiatives
- District chairs for Rotaract, Rotary Youth Exchange, Interact, and Rotary Youth Leadership Awards, along with Rotary alumni chairs, to encourage collaboration and coordination
- Public relations chairs to develop and implement public relations efforts
- Rotary Foundation chairs to ensure that districts actively promote the Every Rotarian, Every Year initiative, use Rotary grants effectively, employ proper stewardship of their funds, continue to support Rotary's commitment to eradicate polio, and participate in PolioPlus activities
- District endowment/major gifts subcommittee chairs to identify major gift strategies

Contact your staff specialist for a list of committee chairs in your region.

Encourage district leaders to revisit their clubs' goals recorded in Rotary Club Central and discuss their progress. RRFCs can help districts track fundraising activity and Paul Harris Society participation, along with club participation and noncontributing clubs. RPICs can encourage districts to have their clubs update their public relations goals. RCs can help districts identify and monitor membership trends and implement actions to achieve membership goals.

### **Marketing yourself to district leaders**

To succeed, market yourself as an expert in the Foundation, member engagement, public image, or major gifts. When district governors, governors-elect, and other district leaders need information, make yourself their first choice. Let others know what your mission is:

- RRFCs help Rotarians fully participate in their Foundation to meet their service and fundraising goals.
- RCs assist Rotarians in engaging current members and attracting new members to meet their membership and service goals.
- RPICs train Rotarians to tell the Rotary story effectively and guide them in their media outreach and social media efforts.
- E/MGAs increase Rotarians' participation in major gifts fundraising and the overall impact of The Rotary Foundation.

You may not have all the answers, but you should know where to get them — from a fellow leader, members of your team, your assistants, Rotary.org, or Rotary staff.

### **Succession planning**

For first-year regional leaders, it is important to meet with your predecessor and discuss initiatives in your region. Plan to introduce yourself to those you will work with during your term, so you can learn how all members of the regional leader team work together throughout the year. Other topics to discuss include:

- Effective strategies and practices
- Background information on district leadership
- Previous goals, targets, and action plans
- Contact information for any other key players in the area

For third-year regional leaders, it is important to meet with your successors and include them in the planning meetings, create introductions, and assist them during the transition. Prepare to pass along files and key practices to support the good work you've begun.

### **Your Team**

The regional leader team consists of the RRFC, RC, RPIC, and E/MGA, led by the director with guidance from the trustee when appropriate. The End Polio Now zone coordinator may also be a member of the regional leader team, offering a communication link between the RRFCs, assistant RRFCs, district leaders, PolioPlus national advocacy advisers, national PolioPlus committee chairs, and Rotary staff.

RRFCs, RCs, and RPICs have assistants. Given some unique aspects of their role, E/MGAs work with the E/MGA leadership team, staff partner, and, in some cases, district leaders.

You may consider certain district leaders and committee positions vital to some aspects of your role. Together, these positions create your team. They contribute significantly to your success as a regional leader.

Your fellow team members can help you accomplish your goals and support districts by broadening your reach and increasing participation in activities throughout your region.

### **Assistant Coordinators**

When RRFCs, RCs, or RPICs choose their assistants, they should seek talented and knowledgeable aides with demonstrated success in helping Rotary clubs engage members, foster effective volunteer activities, and develop strategic plans. Consider selecting assistants who can best help you support large geographic areas, provide language support, or contribute specialized expertise different from your own. While there is no requirement that assistants be past district governors, it is wise to consider the expertise that their experience could provide.

With permission from the district governor, assistants often work closely with assistant governors and other district leaders. Though E/MGAs do not have formally appointed assistants, they have abundant other support.

Your budget will cover funding for your assistants' expenses. Also, you decide how many assistants can help you address your region's needs most effectively. Assistants are appointed to one-year terms, renewable for up to two more years.

To report your proposed assistants to Rotary, your staff specialist will send you a link to an assistant notification form. After consulting with your region's director and trustee for RRFCs, complete the form. Rotary staff will ensure that your proposed assistants are eligible to serve and confirm the appointment with you.

### **E/MGAs**

Endowment/major gifts advisers can draw on the expertise of the E/MGA leadership team, staff partners, and district leaders. Members of the leadership team serve as mentors and advisers throughout the year, and the Major Gifts officers (for North America) and staff partners (outside North America) can help you personalize strategies for cultivating and soliciting major gifts and plan events for cultivating and recognizing Foundation supporters throughout your region. Some E/MGAs also use key leaders in their districts as team members.

## 2. PRIORITIES AND GOALS

---

Under the leadership of the Rotary International Board of Directors and The Rotary Foundation Trustees, regional leaders promote Rotary's strategic plan priorities: support and strengthen clubs, focus and increase humanitarian service, and enhance public image and awareness.

To carry out your responsibilities and reach your goals, assess each district's strengths, weaknesses, opportunities, and risks annually to meet its unique needs. The results will help you tailor your strategies and tactics for the year. You can also gather information by reviewing the goals that clubs have set in Rotary Club Central.

### **Understanding Your Goals**

The president and trustee chair have developed organizational goals and priorities to coordinate the efforts of Rotary leaders at every level.

Specific goals for all RRFs, RCs, RPICs, and E/MGAs will be set to quantify your impact and assess progress on a global scale. You will identify targets appropriate for your region to meet each goal and create an action plan for the year. These specific goals are designed to help you measure whether your region will meet the overall organizational goals. Contact your staff specialist for more detailed information on goals.

### **Developing an Action Plan**

To reach your goals, you will be asked to create an action plan and monitor your region's progress throughout the year. Goals are most effective when they are specific, measurable, achievable, and time-bound.

Consider looking at information available in Rotary Club Central or other reports to get an idea of your region's status at various points during the year. Use these benchmarks to create an initial outline of your action plan; your staff specialist can share goals from past years and help you identify some of these benchmarks.

Consult with your director or trustee during this process to identify regional challenges and develop your action plan. Work with your team and talk to district leaders to create a joint action plan that ensures success.

An action plan will help you identify how you'll measure success and what you'll need to get there, including:

- Resources and tools available
- Resources and tools you need to get
- Potential obstacles
- Responsibilities

After you have thought about these factors, outline the steps needed to achieve your goals. Consider assigning tasks to members of your team. Ask your staff specialist for additional resources or guidance. Be sure to monitor your progress as you work toward achieving your goals, and make modifications if necessary.

## **Reporting Your Progress**

At specified times during the year, you will complete a report of your activities, results, successes, and challenges, including a self-evaluation of progress toward the goals. You will also be asked to provide examples of your communications. Consider these tips for filling out your reports:

- Work with your assistants before completing the report to gather necessary information.
- Keep track of attendance at all of your and your assistants' events to measure reach.
- Share newsletters and communications with your staff specialist.
- Collect success stories and examples of collaboration.
- If you are an E/MGA, use the prospect list template, available on the Regional Leaders Workgroup, to keep track of prospects.

You'll receive an email with a link to the report and will have two weeks to complete it. The information you provide will help Rotary measure the impact of regional leaders' work and ensure that you are receiving the support and resources you need.

After all reports are submitted, you'll also receive an aggregate summary of all regional leaders' reports. Directors and trustees will also receive the aggregate summary. Your reports are also used to identify effective practices, successes to feature in Rotary communications, and areas of improvement.

Be sure to contact your staff specialist with any questions regarding reporting.

## 3. REGIONAL ROTARY FOUNDATION COORDINATOR

---

You are a valuable volunteer resource on Foundation programs and financial matters and serve as a vital link between Rotarians at the club, district, and regional levels, and also between Rotarians and Rotary staff.

RRFCs share information about the Foundation with district governors, governors-elect, and district Rotary Foundation chairs. District leaders, in turn, share this information with club members. Contact your staff specialist for a list of district leaders in your region.

### **Responsibilities**

You have these responsibilities (see section 5.030 in the Rotary Foundation Code of Policies):

- Help districts and clubs focus and increase humanitarian service.
- Assist the trustees and the general secretary in explaining Foundation grants, and the need for funding, to district and club leaders.
- Support district leaders in setting their district Foundation goals for grant participation and Foundation giving.
- Monitor districts' progress on their Foundation goals throughout the Rotary year.
- Keep alumni involved in Rotary with a focus on contributions and Foundation support.
- Assist with developing and promoting alumni associations.
- Coordinate the nomination process for the Rotary Alumni Global Service Award and the Rotary Alumni Association of the Year award. (Working with the RC and RPIC, you may nominate one candidate for each award.)
- Complete reports to the general secretary in a timely manner.
- Help achieve the Foundation's priorities and goals approved by the trustees.

### **Best practices**

Train:

- Your team sometime after the regional leaders training institute in March and before 1 July. You are responsible for creating and conducting this zone team training of Foundation volunteers.
- District leaders during an annual regional Rotary Foundation seminar. You are responsible for planning, promoting, and conducting this training. Include promotion and support of the Foundation, in collaboration with fellow regional leaders when possible.
- Governors-elect and zone leaders on Foundation subjects recommended by the directors

and trustees at governors-elect training seminars, when invited by the convener. Offer special Foundation sessions at Rotary institutes.

**Promote:**

- Proper stewardship, oversight, and reporting in the use of Foundation funds to governors, district Rotary Foundation chairs, and district subcommittee chairs
- Personal contributions to the Annual Fund through Every Rotarian, Every Year
- Rotary Direct and the Paul Harris Society
- Rotary's Endowment Fund
- Rotary Peace Centers
- The End Polio Now — Make History Today campaign
- Areas of Focus Major Gifts Initiative
- The education of Rotarians, alumni, and friends of Rotary on giving opportunities

**Support:**

- Rotarians in focusing on Rotary's top priority: worldwide polio eradication
- District leaders' efforts to achieve their service goals, monitoring each district's progress throughout the year
- District leaders' efforts to inform clubs of the Foundation's grants, programs, polio eradication efforts, and fundraising initiatives, and to conduct Foundation training events (during district assemblies and district conferences, for example)
- District governors and Foundation committees as they plan district or multidistrict Rotary Foundation seminars
- Club and district efforts to keep their alumni involved in Rotary
- Districts in identifying qualified candidates for the Rotary Peace Centers program
- Endowment/major gifts advisers, Foundation staff, and district leaders (when asked) to identify, cultivate, and solicit gifts of \$25,000 or more from Rotarians, corporations, or other friends of Rotary
- Endowment/major gifts advisers (when asked) in organizing events to cultivate Major Donors at Rotary institutes or other Rotary events

**Inspire:**

- Rotarians by making a personal contribution each year to the Annual Fund or through a major gift, Bequest Society commitment, or Benefactor commitment, or by hosting or supporting events to cultivate Foundation donors

## **Your Areas of Expertise**

### **Annual Fund**

The Annual Fund supports Rotary's work today. It is the primary source of funding for Foundation activities. Every Rotarian is encouraged to participate in a Foundation project and contribute to the Annual Fund every year.

One of your primary goals is to motivate districts to increase individual and club contributions to the Annual Fund:

- Work with districts to acquire new donors. Ideas for doing this include educating new

members about the Rotary Foundation and identifying gaps in participation.

- Retain donors by promoting Rotary Direct, Rotary's recurring giving program. Donors who enroll in Rotary Direct give monthly, quarterly, or annually.
- Upgrade donors by encouraging them to join the Paul Harris Society. Strong participation in the Paul Harris Society can ensure long-term growth in annual per-capita contributions and secure more funds for a district year after year. Members of the society agree to give \$1,000 annually, making the society one of the most important contribution levels for achieving our worldwide annual giving goal.

The Reports section in Rotary Club Central, along with the RRFC goals and contribution report on My Rotary, shows monthly information on participation and contribution levels for each district in your region. This enables you to see immediately which districts are performing well and which are struggling. If you see a district falling behind, contact its leaders and offer your support and expertise. Help them develop fundraising events, training, and other strategies to ensure that the district will meet its goals.

Resources that can bolster clubs' and districts' fundraising efforts can be found on [My Rotary](#):

- [Rotary's secure online giving system](#)
- [The Rotary Foundation Contribution Form](#)
- [Every Rotarian, Every Year brochure](#) and [club presentation](#)
- [Paul Harris Society brochure](#)
- [Rotary Foundation Reference Guide](#)
- [Rotary Giving & Grants newsletter](#)
- [Rotary Club Central](#)
- [Rotary Foundation Basics via the Learning Center](#)

### **Rotary service**

Market research has shown that people join Rotary to get involved in service activities and make a positive impact on their communities. They stay in Rotary not only for the connections they make with like-minded leaders and friends worldwide, but also for the continued service opportunities. Here's what you can do to help:

- Encourage clubs to develop projects and volunteer activities that appeal to people of different ages and backgrounds.
- Build on successful collaborations between Rotarians and Rotaractors and encourage multiclub and multidistrict activities.
- Support the Rotary Friendship Exchange district chairs in their efforts to link with clubs in other countries.
- Work with the Community Service, Vocational Service, and Rotary Community Corps district chairs to gain local support for projects through the creation of a Rotary Community Corps.
- Support [district International Service chairs'](#) efforts to identify local Rotarians with expertise in Rotary's areas of focus, grants, and project planning. These Rotarians will form the district's project resource network, available to serve as advisers from a project's host district or region to help clubs improve the quality, impact, and sustainability of global grant projects.

### **Rotary grants**

Rotary grants support a wide variety of humanitarian projects, scholarships, and training, allowing districts and clubs to have a profound and lasting impact on communities in need around the globe. You play a critical role in supporting district leaders during the grant application, approval, implementation, and reporting process, and you should be available to answer questions and offer training. Two types of grants are available, district grants and global grants.

### **District grants**

District grants are block grants that enable clubs and districts to address immediate needs in their communities and abroad. Districts may request up to 50 percent of their District Designated Funds for one grant annually. Districts manage and disburse these funds to support district- and club-sponsored activities, including vocational training teams, scholarships, humanitarian service projects, and cultural exchanges that align with the Foundation's mission.

### **Global grants**

Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale, international humanitarian projects, vocational training teams, and graduate and postgraduate scholarships that have sustainable, measurable outcomes in one or more of Rotary's areas of focus:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

Activities may be carried out individually or in combination — for example, one grant may support a vocational training team and a related humanitarian project. Global grant projects must have a minimum total budget of \$30,000. This includes the World Fund award (minimum \$15,000 and maximum \$200,000), which is based on a 100 percent match of District Designated Fund allocations and/or a 50 percent match of cash contributions from the sponsors. All global grants must be sponsored by two clubs or districts: a host sponsor in the country where the activity takes place and an international sponsor outside that country.

When planning a global grant project, sponsors should conduct a thorough community assessment that explores the pressing concerns in the project location as well as the club and community resources available to address them.

To participate in Rotary grants, districts and clubs first go through a qualification process to ensure that districts and clubs understand the financial responsibilities that come with grants and are prepared to take them on. Qualification must be completed each year. Additional resources that can help clubs and districts can be found on the [Rotary grants](#) page on Rotary.org:

- A Guide to Global Grants
- District Rotary Foundation Seminar Leader's Guide
- Lead Your District: Rotary Foundation Committee manual

- Qualification Memorandum of Understanding for districts and clubs
- Giving & Grants newsletter

### **PolioPlus**

Our PolioPlus program is dedicated to the global eradication of polio, Rotary's highest priority. With the endgame strategy of the Global Polio Eradication Initiative, we're on track to eradicate polio worldwide.

Through 2018, every \$1 Rotary commits to direct support for polio immunization will be matched 2-to-1 (up to \$35 million per year) by the Bill & Melinda Gates Foundation. The End Polio Now — Make History Today campaign will drive the effort to raise the necessary final support.

Work with your End Polio Now zone coordinator to appeal to government officials for continued support of polio eradication, to raise awareness that polio eradication is Rotary's No. 1 priority, and to fundraise for PolioPlus. Work with the coordinator to encourage districts in your zone to contribute 20 percent or more of their starting District Designated Funds, and clubs to give a minimum of \$1,500, to PolioPlus. Work with your entire zone team to encourage clubs and districts to plan a polio event for World Polio Day, 24 October.

Resources that are useful for clubs' and districts' PolioPlus fundraising and advocacy efforts can be found on the [End Polio Now website](#) and include:

- Make History Today campaign resources
- [End Polio Now newsletter](#)
- [Global Polio Eradication Initiative site](#)

### **Alumni**

Rotary alumni are people who have participated in any of Rotary's programs, as Rotaractors, Interactors, Rotary Youth Exchange students, Ambassadorial Scholars, Rotary Scholars, Group Study Exchange and vocational training team members, RYLA participants, or Rotary Peace Fellows. Their positive Rotary experiences, which have influenced their lives and careers, make them strong candidates to engage with Rotary.

Alumni can speak at club or district events, participate in projects, become Rotary members, and contribute to the Foundation — all of which support and expand Rotary's capacity for service. Alumni associations are effective in keeping alumni involved and engaged. Members of these groups — both Rotarians and non-Rotarians — share a common bond and can be involved in various club and district activities.

Encourage each of your districts to appoint a district alumni chair to manage an ongoing relationship with alumni in the district and to connect clubs with their alumni.

The RRFC, RC, and RPIC are involved in the nomination process for the two awards given annually to Rotary alumni: the Rotary Alumni Global Service Award and the Rotary Alumni Association of the Year award. Each zone or region may nominate one candidate for each award every year. The RRFC leads the nomination process and submits the nominations to RI. Your

nominees are considered the winners for your zone or region and can be recognized as such at district or zone events.

The Program Participants and Alumni report available through My Rotary can help you locate candidates. Contact [alumni@rotary.org](mailto:alumni@rotary.org) for assistance.

Resources that can help with your alumni duties can be found on the [Alumni](#) page on My Rotary:

- Alumni Association of the Year award nomination form
- Alumni Global Service Award nomination form

### **Rotary Peace Fellowships**

The Rotary Peace Centers program is the flagship program of our peace and conflict prevention/resolution area of focus and our premier international educational opportunity. Each year, up to 100 Rotary Peace Fellows are selected to pursue postgraduate studies at one of six university-affiliated peace centers around the world.

Local Rotary districts interview and endorse candidates. Endorsing districts have no financial responsibility; all fellowships are funded directly by the Foundation through endowments, donated District Designated Funds, and the World Fund.

You are asked to assist districts that have questions or concerns about the Rotary Peace Centers program. Helpful resources for clubs and districts can be found on the [Rotary Peace Centers page](#) on My Rotary:

- Rotary Peace Fellowship Application
- Rotary Peace Centers Program Guide for Rotarians
- Peace in Action e-newsletter
- Rotary Peace Centers Facebook page
- Making Peace a Reality brochure

Donors can support Rotary Peace Centers through both endowed and term gifts. The Rotary Peace Centers Major Gifts Initiative seeks to secure \$150 million by June 2017 to endow the program. Major gifts and commitments of \$25,000 or more are crucial components to successful achievement of this goal. Rotary senior leaders, members of the Rotary Peace Centers Major Gifts Initiative Committee, regional Rotary Foundation coordinators, and endowment/major gifts advisers serve as the core network for promoting this fundraising effort.

### **Endowment Fund**

The Endowment Fund secures Rotary's future. The principal is never spent; only spendable earnings are directed to Foundation grants and programs. Most major gifts and all life income gifts are directed to the Endowment Fund.

Work with the E/MGAs, along with the Foundation's Fund Development staff, to identify potential Major Donors and Bequest Society members. Become familiar with the goals of the Endowment Fund so that you can promote giving to it.

Resources that can help clubs and districts with their planned and major gifts efforts can be found on [My Rotary](#):

- [Endowment Fund page](#)
- [Rotary Giving Works](#)
- [Your Rotary Legacy](#)
- [Ways to Give](#)

## 4. ROTARY COORDINATOR

---

You are the key volunteer resource helping to create strong, dynamic, and effective Rotary clubs while addressing the unique issues of districts in your region. You will serve as a facilitator, motivator, and consultant, and as a communication link.

You share information with district governors, governors-elect, district committee chairs, and other district leaders, who in turn pass the information on to club members.

### Responsibilities

Your responsibilities (see Article 26.040 of the Rotary Code of Policies) are to:

- Encourage innovative engagement and new member attraction strategies to support membership growth and promote the benefits of membership
- Emphasize member engagement through effective volunteer activities, networking, and programs and activities that support youth and young leaders and alumni
- Recommend solutions to membership challenges, such as more flexible club meetings, focusing on member satisfaction, and enhancing volunteer opportunities
- Help districts and clubs develop and implement their own strategic plans
- Promote Rotary International's priorities and initiatives
- Assist with the development and support of alumni associations
- Help achieve the annual priorities and goals approved by the Board

### Best practices

Develop strategies:

- Familiarize yourself with membership data and trends through the reports available on My Rotary and in Rotary Club Central.
- Connect clubs that need assistance with Rotarians who are finding innovative ways to enhance membership, public image, program participation, and service.
- Work with district leaders to create a membership experience that meets the needs of Rotarians and prospective members in your region.
- Encourage greater club participation in Rotary Youth Exchange, Interact, and RYLA.
- Establish Rotaract clubs in communities that can sustain them.
- Work with Rotaractors and Rotary program alumni and invite them into Rotary or keep them connected to the family of Rotary.
- Use Rotary events as opportunities to connect with members and to encourage members to connect with one another.

**Communicate:**

- Tell success stories of effective clubs, including those with innovative membership strategies, to inspire and motivate club and district leaders.
- Connect regularly with districts through a zone website, blog, webinars, or newsletter.
- Improve community awareness of Rotary clubs by collaborating with your RPIC.

**Train:**

- Collaborate with fellow regional leaders, when possible, on regional seminars that can help district and zone leaders support member engagement and strengthen clubs.
- Guide governors-elect as part of the GETS team, when invited by the convener, and assist at Rotary institutes and other zone-level meetings when possible.
- Help incoming club officers during club and district events such as presidents-elect training seminars, when invited to do so.

**Advise:**

- Suggest creative approaches that support and strengthen clubs.
- Help clubs and districts to give new members an orientation and to assign them a mentor.
- Recommend ways to use membership awards and recognize members and clubs for innovative ideas and successful initiatives for member engagement.
- Highlight the need to conduct regular club assessments and to survey current and former club members to increase member retention.
- Stress the importance for clubs and districts to develop and implement a multiyear strategic plan.
- Emphasize the importance for governors and membership chairs to connect regularly with their membership leads and assign them to clubs.
- Support governors on the three-year appointment of a district membership chair.
- Encourage the support of Rotary's programs for young leaders (Rotaract, Interact, Rotary Youth Exchange, and RYLA) to increase service and member engagement, along with opportunities for Rotary alumni and young leaders to engage with Rotary.

Work closely with your RI director to determine your priorities and create the action plan for your term.

## **Your Areas of Expertise**

### **Membership Attraction and Engagement**

Rotary is made up of more than 35,000 clubs that include more than 1.2 million members in nearly every country. Membership is our highest organizational priority, and our continued ability to provide friendship and service in communities around the world depends on a strong and engaged membership.

Suggested ways to focus on membership:

- Help clubs and districts understand the new flexibility offered by the 2016 Council on Legislation, encouraging clubs to become flexible about attendance rules, meeting frequency, meeting types and membership types to enhance their membership appeal.
- Promote a diverse membership, focusing particularly on attracting younger professionals, women, and professionals from emerging fields.
- Encourage districts to start new, dynamic clubs.
- Promote the efforts and approaches of successful clubs as models for others.
- Help district leaders assist weak and struggling clubs.
- Encourage districts and clubs to follow up on the membership leads sent to them.
- Invite clubs to include Rotaractors and Interactors and alumni in projects, meetings, and events.
- Support significant regional and district training and events that prepare club and district leaders to promote membership activities.
- Collaborate with your director, other regional leaders, and Rotarians at all levels on strategies for attracting new members, engaging current members, and building club capacity.
- Work with your director to evaluate your strategies and offer opinions.

Resources that can help clubs enhance their membership efforts can be found at [www.rotary.org/membership](http://www.rotary.org/membership). Familiarize yourself with and promote our top five resources:

- Rotary Club Health Check
- Strengthening Your Membership: Creating Your Membership Development Plan
- Membership Assessment Tools
- Introducing New Members to Rotary: An Orientation Guide
- Creating a Positive Experience for Prospective Members

Reports found in Rotary Club Central and on the Club and District Administration page of Rotary.org show monthly membership information for each district. This enables you to see immediately which districts are performing well and which are struggling.

If you see a district falling behind, offer its leaders your support and expertise. Help them plan membership events, training, and other strategies to ensure that the district will meet its goals.

### **Rotary service and member engagement**

Strengthening clubs is all about creating an engaging, satisfying experience for current members and making the club more attractive to potential members.

Market research has shown that people join Rotary to get involved in service activities and make a positive impact on their communities. They stay in Rotary not only for the connections they make with like-minded leaders and friends worldwide, but also for the continued service opportunities. Here's what you can do to help:

- Encourage clubs to develop projects and volunteer activities that appeal to people of different ages and backgrounds.
- Work with the appointed committee chairs for each of Rotary's Avenues of Service and related activities to boost member participation and engagement. Contact your staff specialist for a list of committee chairs in your region.

- Create an engaged membership and a greater capacity for projects by promoting connections among Rotarians throughout your zones.
- Build on successful collaborations between Rotarians and Rotaractors and encourage multiclub and multidistrict activities.
- Support the Rotary Friendship Exchange district chairs in their efforts to link with clubs in other countries.
- Work with the Community Service, Vocational Service, and Rotary Community Corps district chairs to gain local support for projects through the creation of a Rotary Community Corps.

Rotary also supports Global Networking Groups and intercountry committees. The networking groups unite Rotarians, their partners, and Rotaractors to focus on common topics of interest. There are two types of Global Networking Groups:

- Rotarian Action Groups are organized around specific service topics and help clubs and districts plan and implement effective projects.
- Rotary Fellowships are groups of people with a common hobby, recreational interest, or vocation.

Intercountry committees encourage lasting cooperation between districts in two countries, aiming to improve cross-cultural understanding and promote peace. An intercountry committee provides a framework for establishing twin clubs, conducting Friendship Exchanges, and teaming up on projects. These groups enhance member retention and engagement, and improve service results.

Encourage Rotarians to create a My Rotary account and take advantage of social tools. Through their account, Rotarians can motivate and engage clubs, districts, and nonmembers in their region by joining [discussion groups](#), promoting projects that seek resources on [Rotary Ideas](#), and spotlighting successful projects on [Rotary Showcase](#), Facebook, Twitter, and other social media.

Rotary's programs for young leaders provide a range of experiences enabling a young person to move from one program to another and increase connections with Rotary that can last a lifetime. Young leaders can participate in:

- Interact
- Rotaract
- Rotary Youth Exchange
- Rotary Youth Leadership Awards
- Rotary Community Corps
- Rotary Friendship Exchange

On the [Empower Leaders](#) and [Develop Projects](#) pages on My Rotary, you can find resources to develop leaders in your community:

- Communities in Action: A Guide to Effective Projects
- Rotary Community Corps
- Community Assessment Tools
- Rotary's Areas of Focus
- Developing and Promoting Your Service Project course in the [Learning Center](#)
- Club Finder
- Lead Your Club: Service Projects Committee

## **Alumni**

Rotary alumni are people who have participated in any of Rotary's programs, as Rotaractors, Interactors, Rotary Youth Exchange students, Ambassadorial Scholars, Rotary Scholars, Group Study Exchange and vocational training team members, RYLA participants, or Rotary Peace Fellows. Their positive Rotary experiences, which have influenced their lives and careers, make them strong candidates to engage with Rotary.

Alumni can speak at club or district events, participate in projects, become Rotary members, and contribute to the Foundation — all of which support and expand Rotary's capacity for service. Alumni associations are effective in keeping alumni involved and engaged. Members of these groups — both Rotarians and non-Rotarians — share a common bond and can be involved in various club and district activities.

RCs collaborate with district governors and district alumni chairs on strategies to identify and engage alumni in their region. Encourage each of your districts to appoint a district alumni chair to manage an ongoing relationship with alumni in the district and connect clubs with their alumni.

The RRFC, RC, and RPIC are involved in the nomination process for the two awards given annually to Rotary alumni: the Rotary Alumni Global Service Award and the Rotary Alumni Association of the Year award. Each zone or region may nominate one candidate for each award every year. The RRFC leads the nomination process and submits the nominations to RI. Your nominees are considered the winners for your zone or region and can be recognized as such at district or zone events.

The Program Participants and Alumni Report available through My Rotary can help you find candidates. Contact [alumni@rotary.org](mailto:alumni@rotary.org) for help.

Resources that can help you with your alumni duties appear on the [Alumni](#) page on My Rotary:

- Alumni Association of the Year award nomination form
- Rotary Alumni Global Service Award nomination form

## **Strategic planning**

Districts and clubs that develop and follow strategic plans are in a stronger position to respond to change. Those that plan for the long term are more successful because they have analyzed their current state, identified challenges, and developed ways to address obstacles to reaching their long-range goals.

Aligning club and district plans with the priorities of Rotary's strategic plan creates a common purpose that supports Rotary's growth. Clubs with strategic plans report more satisfied members and state that their clubs are stronger.

Work with districts as they follow or develop a multiyear strategic plan to maintain their focus from year to year. Promote the District Planning Guide, found in the district governor's manual,

as a valuable resource to help the governor, governor-elect and governor-nominee collaborate on strategic planning.

Encourage districts to motivate clubs to develop and follow a strategic plan. Advise governors to inform their clubs about Rotary's strategic plan and help them with planning by using the [Strategic Planning Guide](#).

A strategic plan allows clubs and districts to develop continuity even as leadership changes. To promote these plans, you can:

- Ask districts if they have a leadership development program.
- Encourage them to create a leadership and succession plan.
- Recommend that they involve incoming and immediate past leaders throughout the planning.
- Show them that monitoring their plan in Rotary Club Central creates historical data that will inform future leaders' planning and goal setting.

## 5. ROTARY PUBLIC IMAGE COORDINATOR

---

You are an important resource to help determine perceptions of Rotary and our efforts, both internally and externally. You serve as a vital link between Rotarians at all levels, and between Rotarians and Rotary the global organization. Your efforts will raise awareness and understanding of Rotary and the work it does in its communities.

RPICs share information with district governors, governors-elect, and [district public relations committee](#) chairs, who, in turn, pass on the information to club members.

### Responsibilities

You have these responsibilities (see 50.030 in the Rotary Code of Policies):

- Inform and motivate Rotarians about Rotary's public relations efforts.
- Encourage stronger club-level public relations efforts.
- Promote Rotary's strategic plan priorities of advancing both internal and external awareness and image of Rotary. Serve on the governors-elect training team with other zone leaders on subjects recommended by the directors and trustees at governors-elect training seminars, when invited by the convener.
- Promote the use of Rotary's visual identity assets.
- Highlight alumni to enhance Rotary's public image.
- Help achieve the annual priorities and goals approved by the Board.

### Best practices

Develop strategies:

- Connect clubs and districts with Rotarians who have found innovative ways to enhance public image through social media.
- Work with district leaders to incorporate communication planning into existing plans, address critical district communications needs, and connect them with resources.
- Promote long-term club and district communication planning, assess public image needs, and identify ways to increase awareness and understanding of the organization.
- Consider how best to highlight alumni to enhance Rotary's public image.

Communicate:

- News and updates regularly on a zone website, blog, or electronic newsletter
- Local and Rotary efforts to enhance Rotary's public image and external awareness
- Polio eradication efforts internally, by sharing updates and resources

- Polio eradication efforts externally, through social media, advocacy, and media outreach; promote regional stories to regional media
- The strategic use of social media to advance internal and external awareness of Rotary
- Details of Rotaract, Interact, and alumni association projects, emphasizing their connection to Rotary

**Train:**

- District and zone leaders by holding regional seminars and district public image seminars that promote PR resources, Rotary's voice and visual identity, media outreach, and social media participation; collaborate with fellow regional leaders when possible
- Districts and clubs to engage local media in their projects and events
- District governors-elect as part of the governors-elect training seminar training teams, when invited by conveners, and assist at Rotary institutes and other zone-level meetings, as needed
- Members at club and district events, including the presidents-elect training seminar, when invited

**Advise:**

- Help districts with public image and communication planning.
- Show how best to conduct public and media outreach on key dates, such as World Polio Day and World Understanding and Peace Day, by sharing examples of innovative and creative approaches.
- Detail external outreach efforts, both online and using traditional media.
- Emphasize the importance for governors and membership chairs to connect regularly with their membership leads and assign them to clubs.

**Assist with media outreach:**

- Offer districts and clubs tips and tools for using their local media.
- Place stories in regional publications.

Be sure to work closely with your RI director to determine your priorities and develop an action plan for your term. Consider reviewing your region's membership strategies to tailor public image efforts to attract new members and engage current members.

## **Your Areas of Expertise**

### **Public image training**

You conduct public image training in addition to promoting available Rotary and external resources for use at the regional, district, and club levels.

**Suggested ways to focus on public image training:**

- Conduct, facilitate, or support public image training sessions in your region, using the [District Public Image Seminar Guide](#).
- Regionalize existing training modules, or develop new ones, on media outreach, communication planning, and social media.

- Assist with introducing, explaining, and coaching districts on Rotary's brand, including best practices for using the new visual identity and voice.
- Encourage district leaders to develop an overall communication plan.
- Promote use of online tools, such as Rotary Club Central and Rotary Ideas.
- Encourage the use of social media to promote Rotary's benefits and humanitarian efforts and to communicate and engage with internal and external audiences.
- Use social and other media to promote Rotary's special events, such as World Polio Day.

Resources that can help districts and clubs plan can be found on the [public relations](#) page on My Rotary, and include:

- Rotary's Brand Center
- Rotary Club Central
- Tell Rotary's Story: Voice and Visual Identity Guidelines
- Effective Public Relations: A Guide for Rotary Clubs
- Lead Your Club: Public Relations Committee
- Rotary Media Center, Rotary Images, and Rotary's Vimeo page
- What's Rotary? cards

### **Public relations outreach**

Rotary asks you to serve as a public image ambassador. Use your outreach training and activities to help Rotary receive positive media coverage for projects and service efforts. Work with both Rotary leaders and staff on your outreach efforts.

Districts and clubs can tell their stories to the public in many ways:

- Maximize existing social media channels to promote successful projects to the public by sharing with friends, for example.
- Promote and support our End Polio Now efforts by inviting a member of the media to participate in a National Immunization Day, fundraiser, or event.
- If possible, secure the participation of a local, regional, or global celebrity for the This Close campaign.
- Increase positive media coverage of Rotary by encouraging districts and clubs to place stories in major regional publications and establish relationships with local media.

World Polio Day (24 October) and World Understanding and Peace Day (celebrated on 23 February, Rotary's anniversary) are two occasions when media outreach would be appropriate. Special Rotary events throughout the year also offer opportunities to engage with the media.

Resources that can help clubs and districts in their outreach to media and other community-focused platforms include:

- Rotary's Brand Center
- Media Center on My Rotary
- B-roll library for media
- Rotary Showcase
- Rotary Ideas
- End Polio Now website
- Rotary's social media

## **Alumni**

Rotary alumni are people who have participated in any of Rotary's programs, as Rotaractors, Interactors, Rotary Youth Exchange students, Ambassadorial Scholars, Rotary Scholars, Group Study Exchange and vocational training team members, RYLA participants, or Rotary Peace Fellows. Their positive Rotary experiences, which have influenced their lives and careers, make them strong candidates to engage with Rotary.

Alumni can speak at club or district events, participate in projects, become Rotary members, and contribute to the Foundation — all of which support and expand Rotary's capacity for service. Alumni associations are effective in keeping alumni involved and engaged. Members of these groups — both Rotarians and non-Rotarians — share a common bond and can be involved in various club and district activities.

The RRFC, RC, and RPIC have the opportunity to nominate candidates for the two awards given annually to Rotary alumni: the Rotary Alumni Global Service Award and the Rotary Alumni Association of the Year award. Each zone or region may nominate one candidate for each award every year. The RRFC leads the nomination process and submits the nominations to RI.

Your nominees are considered the winners for your zone or region and can be recognized as such at district or zone events. The Program Participants and Alumni report available through My Rotary can help you locate candidates. Contact [alumni@rotary.org](mailto:alumni@rotary.org) for assistance.

Resources that can help you with your alumni duties can be found on the [Alumni](#) page on My Rotary:

- Alumni Association of the Year award nomination form
- Rotary Alumni Global Service Award nomination form

## 6. ENDOWMENT/MAJOR GIFTS ADVISER

---

You are the primary Rotary resource for major gift and endowment matters. You help districts develop fundraising committees and identify strategies for encouraging major and planned gifts. You focus on working collaboratively with fellow Rotarians, including trustees and regional and district leaders, and with Rotary staff to increase the number and size of major gifts.

E/MGAs share relevant information with district governors, governors-elect, and district committee chairs, who, in turn, pass the information on to club members.

### **Responsibilities**

You have these responsibilities (see 5.110.3 in the Rotary Foundation Code of Policies):

- Lead by example and make a personal contribution to the Annual Fund each year.
- Make a major gift or Bequest Society commitment, according to your financial capacity.
- Emphasize to districts the importance of Rotary's endowment.
- Educate Rotarians, alumni, and friends of Rotary on opportunities for major giving, and emphasize Rotary's endowment, PolioPlus, Rotary Peace Centers, and areas of focus.

Train:

- District leaders on major gifts, Rotary's endowment, and Bequest Society commitments at Rotary institutes, regional seminars, presidents-elect training seminars, Foundation seminars, and other Rotary events as requested
- Districts to establish a structure for identifying and cultivating potential donors for major gifts and the endowment
- Your team by identifying potential members (such as accountants, estate planning attorneys, financial advisers) for Rotary's Gift and Estate Planning Professionals program, and provide opportunities for involving them in district fundraising activities

Fundraise:

- By developing personalized plans for cultivating and soliciting at least 15 prospective Major Donors each year in collaboration with fund development staff partners, RRFCs, and district leaders
- By personally participating in or being productively involved with the solicitation of at least 10 major gifts each year, with an emphasis on gifts of \$25,000 or more
- By hosting or supporting events to cultivate and recognize important Foundation donors at Rotary institutes or at other Rotary events, with the RRFC and fellow E/MGAs attending the institute

- By working with RRFs and district leaders to plan events to cultivate Foundation supporters and prospective supporters, including identification of potential guests who might be interested in making a major or planned gift

## **Best practices**

### Strategize:

- Research major giving patterns of districts and consider allocating time accordingly.
- Use Rotary Club Central to review major gift and endowment goals set by clubs and districts to better understand interest in major gifts.
- Identify the best ways to use major gift educational materials online, at your local library, or through a professional fundraising association, and consider how to apply this knowledge.
- Commit to updating your prospect list regularly with Foundation staff and volunteers.

### Communicate:

- Regularly with district and club leaders to highlight yourself as a major gift fundraising resource and to provide updates
- Regularly with Foundation staff
- By sending thank-you notes to donors of major gifts or those making commitments
- By sending creative, personal, tailored messages to strengthen relationships with your prospect list
- By establishing a reminder system to maintain communication with your prospects, Rotarian colleagues, and staff partner

### Train:

- District leaders in building local structures and methods for facilitating major gifts
- At regional seminars that support major giving, in collaboration with fellow regional leaders when possible
- At Rotary institutes by presenting or assisting when invited
- At club and district events, including presidents-elect training seminars and other relevant opportunities when invited

### Advise:

- On major giving options and giving vehicle structures
- On the Gift and Estate Planning Professionals program, and identify individuals with experience in estate and financial planning who might consider subscribing to the program to learn how Rotary can facilitate charitable giving goals
- On examples of how major gifts and commitments have been secured through teamwork and communication

Work closely with fellow regional leaders; Foundation staff, particularly your staff partner; the endowment/major gifts advisers leadership team; and others to determine your priorities and finalize goals for your term.

### **E/MGA leadership team**

Trustees approved the leadership team in June 2016. Its goal is to maximize the expertise and skills of past E/MGAs to offer guidance and peer support to incoming and current E/MGAs. Team members serve as mentors and training advisers to current E/MGAs. First- and second-year E/MGAs are paired with a member of the leadership team for mentoring, and third-year E/MGAs are also encouraged to reach out to the leadership team for guidance.

## **Your Areas of Expertise**

Using the four-step process for major gift cultivation and offering your expertise on that process with district leaders is a proven formula for success:

<b>1</b>	<b>Identification</b>	<ul style="list-style-type: none"><li>▪ Identify who might be interested and able to make a major gift.</li></ul>
<b>2</b>	<b>Cultivation</b>	<ul style="list-style-type: none"><li>▪ Learn about and nurture their Rotary interests.</li><li>▪ Let them know the reasons to make major gifts and the opportunities to do so.</li></ul>
<b>3</b>	<b>Solicitation</b>	<ul style="list-style-type: none"><li>▪ Work with your major gifts officer or staff partner to ask prospects for major gifts.</li></ul>
<b>4</b>	<b>Donor stewardship</b>	<ul style="list-style-type: none"><li>▪ Help recognize donors who have made major gifts.</li><li>▪ Continually thank and involve major gift donors.</li></ul>

### **Major and planned gifts**

To match donor interest and motivation with major gift opportunities, get to know Rotary's specific gift designation options and gift acceptance policy. Rotary defines a major gift as a one-time, outright gift or major gift pledge of \$10,000 or more. You should focus on major gifts and testamentary commitments of \$25,000 or more.

Rotary defines a testamentary commitment — commonly called a bequest — as a donor's written intent to bequeath funds to Rotary after death, through a will, estate plan, or retirement plan. The Foundation understands that cultural practices vary. In some regions, these differences may warrant a greater focus on outright gifts over bequests or vice versa.

Donors can make major gifts to the Annual Fund, PolioPlus, Endowment Fund, Rotary Peace Centers, or an area of focus. Gifts may be made to The Rotary Foundation Endowment Fund or as a term (fully expended) gift. Naming opportunities are available to donors making major gifts or testamentary commitments of \$25,000 or more.

### **The Rotary Foundation Endowment Fund**

The Rotary Foundation's Endowment Fund is intended to help secure Rotary's future. The principal is invested and never spent; the spendable earnings are directed to Foundation grants and programs. Many major gifts and all life income gifts are directed to the Foundation's Endowment Fund.

Within the Endowment Fund, gifts can be further designated to SHARE, the World Fund, an area of focus, or the Rotary Peace Centers. Gifts and testamentary commitments of \$25,000 or more to the Endowment Fund allow donors to create a fund in their name or that of a loved one. This can be accomplished immediately with an outright major gift, over time with a major gift pledge, or in the future with a testamentary commitment.

Foundation records account for named funds separately. When a donor is considering a gift of \$25,000 or more to the Endowment Fund, you will work with your staff partner to present the donor with a gift agreement that shows how the fund will be established and operated. This helps ensure that donor expectations and Foundation guidelines are in agreement.

Named funds can be designated for an area of focus, a type of project, and other opportunities depending on the gift's size. For any named fund within the Endowment Fund, donors will receive periodic reports from the Foundation explaining how their spendable earnings have been used.

### **Term gifts**

Donors can also make outright gifts to fund a specific, one-time activity in their name or that of a loved one. These are called term gifts and are available for the Rotary Peace Centers and global grants. As with named funds within the Endowment Fund, term gifts can be designated for an area of focus, a type of project, and other opportunities depending on the gift's size. You'll work with staff to present the donor with an agreement to ensure that the term gift meets donor expectations and conforms to Foundation guidelines. For any term gift, donors will receive periodic reports from the Foundation explaining how their gift has been used.

### **Annual Fund and PolioPlus**

Donors can make gifts of any size to the Annual Fund or PolioPlus.

Annual Fund contributions are the primary source of funding for a broad range of local and international Rotary Foundation activities. Annual Fund contributions are invested for three years to help pay for our fund development and general administrative expenses. They then become available for districts and the Foundation to designate for grants and projects.

Within the Annual Fund, donors may direct their contributions to SHARE, which generates the World Fund and District Designated Funds; to the World Fund; or to one of the Foundation's six areas of focus. All Annual Fund contributions, regardless of designation, count toward Major Donor and Arch Klumph Society status.

Through 2018, every \$1 that Rotary commits to direct support for polio immunization will be matched 2-to-1 (up to \$35 million per year) by the Bill & Melinda Gates Foundation. The End Polio Now — Make History Today campaign will drive the effort to raise the final support that Rotary needs.

The \$35 million annual goal for PolioPlus includes about \$3.5 million each year in major gifts, together with ongoing club and district fundraising efforts. Major gifts to PolioPlus must be outright rather than to the endowment because the gifts will be fully expended on the eradication effort. However, in cases where a major gift donor prefers an endowment, a gift

agreement may be crafted that enables support for another purpose such as an area of focus once the eradication goal has been accomplished.

### **Major gifts to The Rotary Foundation**

The Rotary Foundation offers many opportunities for donors to support Rotary's highest priorities. In addition to the Annual Fund, the World Fund, and End Polio Now – Make History Today, major gifts and commitments may support the areas of focus and Rotary Peace Centers.

The Water and Sanitation Major Gifts Initiative started on 1 July 2016. A major gifts initiative for basic education and literacy will begin on 1 July 2017, and similar initiatives for the remaining areas of focus will roll out one per year after that. Contributions can provide immediate support or create an endowment. Both outright and planned gifts help meet each Major Gifts Initiative's goal.

The Rotary Peace Centers program provides advanced international educational opportunities in studies related to peace and conflict resolution at six centers at universities throughout the world. The more than 1,000 peace centers alumni work in every part of the world, addressing the root causes of war, resolving conflict, and teaching others the skills that they developed during their academic and fieldwork as Rotary Peace Fellows. The Rotary Peace Centers program is one of the highest educational priorities for the Foundation.

The goal of the Rotary Peace Centers Major Gifts Initiative is to fully endow the Rotary Peace Centers in the amount of \$150 million by 30 June 2017 to provide funding for up to 100 Rotary Peace Fellows per year. Donors can support Rotary Peace Centers through both Endowment Fund and term gifts. Major gifts and commitments of \$25,000 or more are crucial to achieving this goal. Resources to assist clubs and districts in their planned and major gifts efforts can be found on the [Endowment Fund](#) page on My Rotary, and include:

- Gift Acceptance Policy
- Rotary Giving Works
- Your Rotary Legacy brochure
- The Rotary Foundation Reference Guide
- Planned Giving (U.S.)
- Gift and Estate Planning Program kit (request a copy by emailing [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org))

The following resources further define giving and recognition options and guidelines for Rotary Peace Centers:

- [Rotary Peace Centers: Making Peace a Reality](#)
- [Rotary Peace Centers Fellowships](#)

### **Opportunities for corporate support**

Maximizing support from corporations and their foundations helps Rotary make an even greater impact. Through corporate donations to our areas of focus or sponsorship of Rotary events like the International Convention or World Polio Day, Rotary can accomplish even more. If you have contacts who can influence corporate giving, please contact the Partnerships office, [partnerships@rotary.org](mailto:partnerships@rotary.org).

## 7. TRAINING

---

Incoming RRFs, RCs, and RPICs will attend the regional leaders training institute to prepare for their roles. In 2017, incoming and first-year E/MGAs will attend the E/MGA training institute. This training enables participants to learn more about their role, meet other leaders, engage in fellowship, and exchange ideas. Throughout the year, additional opportunities will become available to regional leaders for distance learning and knowledge sharing.

You'll have many opportunities to get involved with other training events, and attendance is vital to your role in communicating with clubs and districts. It also provides an excellent opportunity to introduce yourself, to demonstrate the value you bring to districts, and to begin building relationships with district leaders.

It's important to consider the way you present information, in order to help attendees to retain what they're learning. Appendix 3 provides an overview of training seminars throughout the year as well as tips for planning successful training.

### **Regional Rotary Seminars**

The regional seminar is intended to give participants the tools they need to reach every member, and should provide information and updates on Rotary's strategic initiatives. The seminar should motivate club and district leaders and offer them opportunities to exchange ideas and connect with you and the other members of the regional leader team.

Consider working with your regional leader team members to organize a joint district or multidistrict training seminar with concurrent sessions from which attendees can choose. The seminar should include district governors, governors-elect, and district committee chairs and be open to past officers, End Polio Now zone coordinators, and other interested Rotarians.

A joint district or multidistrict seminar allows the regional leaders to address their region's district leaders as a team and promote broader initiatives. To accommodate busy schedules, consider holding the seminar as a one-day training event in conjunction with GETS and the Rotary institute or with other key regional events. Remember to tailor the training to the specific needs of the participants in those events.

If you and your fellow regional leaders choose to work together, you can hold joint general sessions and lead separate concurrent discussion sessions or workshops related to your areas of expertise. See your Regional Leaders workgroup for a sample agenda. You can find a Trainer's

Toolkit course in the [Learning Center](#) at Rotary.org to help you prepare. The course includes meeting logistics, adult learning theory, and planning calendars.

## **Governors-elect Training Seminar and Rotary Institutes**

RRFCs, RCs, and RPICs should plan to attend the governors-elect training seminar. Keep in mind that most Rotary institutes cover more than one zone, so all regional leaders may not be members of the official GETS training team. The RRFC, RC, and RPIC budget includes funding for participation at GETS and the Rotary institute, regardless of whether you're a member of the official GETS team.

Throughout GETS, you'll have the opportunity to introduce yourself to district governors-elect and other leaders, learn more about challenges in their districts, and offer your expertise and assistance by conducting sessions related to your role or by networking at social events.

Here are some topics that you may be asked to train on at GETS:

- RRFCs: The Rotary Foundation and its grants, programs, and fundraising initiatives
- RCs: membership development, strategic planning, leadership development, Rotary service activities and programs
- RPICs: public relations, social media outreach

RRFCs, RCs, and RPICs work with the institute convener and GETS team leader for your region to clarify your precise role. Make them aware of your areas of expertise and explain how you can contribute to a successful training for governors-elect.

E/MGAs may be invited by the GETS team leader or institute convener to present or train at the GETS or institute. Take advantage of this opportunity to promote major gifts and cultivate current and potential Major Donors. This is a good opportunity to work with the RRFC on planning a donor recognition event during the institute.

## **Presidents-elect Training Seminar**

You won't be able to attend every presidents-elect training seminar, but reach out to governors-elect to offer your support and participation — especially for multidistrict PETS — to reach Rotarians at the club level. You may attend as a presenter, trainer, resource, or in another capacity. If you're invited to a PETS but can't attend, consider sending an assistant (RRFC, RC, RPIC only).

## **Training Your Team**

Training is an essential component of building your team. All of your assistants or team members should be trained before 1 July in order to be prepared to achieve the goals you will focus on in the coming year. Some regional leaders work together to organize a joint training seminar for their assistants. Refer to the zone team training manual and assistant training manual, in the Resources folder on your workgroup, to see sample agendas, evaluations, and discussion questions for your assistant or zone team training.

As a coordinator, you'll oversee assistant training, but all attendees should be prepared to participate in and lead discussions. You're encouraged to supplement the training with topics and ideas that best serve your zone and districts.

## **Distance Training and E-Learning**

Depending on the size of your region, you may not be able to visit every district in person. Distance learning can be the next-best way. Webinars, online meetings, teleconferencing, and videoconferencing allow people in different regions and time zones to meet. But online communication doesn't have to be just for training purposes; it can also help your team members communicate with one another throughout the year.

The most engaging webinars are interactive, practical, and discussion-oriented. When planning an online meeting, allot plenty of time for participants to share ideas. Consider teaming up with another regional leader to discuss a topic that is relevant to both your regions.

If you're new to distance learning or need a refresher, check out these resources:

- The How to Run a Webinar: For Organizers course in the [Learning Center](#) (under Professional Development in the subject list)
- [Discount on webinar license](#)

There are also several e-learning resources on the Learning Center to help you as a regional leader. You are highly encouraged to take the course that corresponds to your role:

- Introduction to your role: RRFC
- Introduction to your role: RC
- Introduction to your role: RPIC
- Introduction to your role: E/MGA

To access these courses, sign in to the Learning Center and choose Your Role in the subject lists. Continuing regional leaders (and your team, when applicable) are also encouraged to take the courses to stay informed and continue to develop skills.

The Learning Center contains many other courses that might interest you. Spend some time exploring what is available and take a course or recommend one to others.

## 8. RESOURCES

---

A number of resources are available for you to use throughout your term. Resources are updated throughout the year, and you will receive announcements of updates through your staff specialist and the Communiqué.

The resources listed below are designed for all Rotarians throughout the world; some of these are critical to helping you fulfill your responsibilities. If you have questions on how to best use these resources, please contact your specialist.

### **Online Tools**

On [Rotary Ideas](#), our crowdsourcing platform, Rotary and Rotaract members can promote their projects and seek partners, volunteers, online contributions (via PayPal), and in-kind donations.

[Rotary Showcase](#), an online database of successful service projects, offers a place for Rotary members to post their project descriptions, photos, and videos, and identify partner clubs. Encourage clubs to take advantage of Rotary's social media to make connections and extend Rotary's reach.

### [Brand Center](#)

The center can help Rotarians view guidelines for Rotary's brand, personalize Rotary logos and brochures to fit their needs, download materials, and gather images and videos for use. With the Brand Center, you can help strengthen Rotary's image by delivering a clear, compelling message that conveys what we do and how people can engage with us.

### [Document Center](#)

This is the place for Rotary documents and curriculum. You can find updated manuals, forms, and exchange-rate information here. It's a great place to send Rotarians who are seeking a document on My Rotary but aren't sure of where to go.

### [Learning Center](#)

This center offers courses on specific topics to help you stay informed, and continue to develop skills.

### **Practice Lab**

This resource allows Rotarian trainers to become familiar with using Rotary tools in a risk-free environment with fictitious data. The Practice Lab is available in the same languages as My Rotary.

**Travel & Expenses page on My Rotary**

All Rotary travelers must follow [Rotary's travel policy](#), which includes guidelines for expenses and reimbursement. We cannot reimburse you for travel expenses you incur before your travel has been authorized. You are responsible for paying for travel arrangements not funded by Rotary.

**Coordinator View on Rotary Club Central**

[Rotary Club Central](#) is an online tool where clubs set goals and track their achievements. Club presidents, secretaries, executive secretaries, treasurers, Foundation chairs, and membership chairs can enter club goals and report achievements in three key areas: membership initiatives, service activities, and giving. You and your assistants can use Coordinator View, which shows you the information that your clubs and districts have put in Rotary Club Central. To access it, sign in to My Rotary.

## 9. COMMUNICATION

---

Strong leaders communicate regularly and with purpose. You will improve your effectiveness as a regional leader if you make yourself available to your team and to district leaders. Encouraging frequent and informative updates will lead to better information exchange for all involved. Communicate regional initiatives, Rotary news, and other information openly and frequently.

### Telling Rotary's Story

The Rotary story can be anything related to our organization as a whole, from local projects to the polio initiative to fundraising events. An important part of every Rotarian's role is to share these stories; as a leader, you provide guidance on when this is appropriate and how to do it.

One of the first factors to consider is your audience: Who is your target and why? Is the target audience other Rotarians, non-Rotarians, or both? What should they learn and why should you tell this story? What actions are we asking them to take with this information?

Next, consider which channel or platform is best suited to tell this story and how you might tailor your message to fit the platform. Options might include:

- [Rotary Showcase](#)
- Facebook, Twitter, Instagram, YouTube, and Snapchat
- Newsletters and blogs
- Club and district websites
- Word of mouth

Rotary's [Voice and Visual Identity Guidelines](#) can help you frame these stories consistently, and a Rotary public image coordinator can be a resource in deciding the most effective way to communicate.

### Creating Your Communication Plan

You're the vital link in building the relationships that will promote the initiatives of Rotary. Before the year begins, think about how you'll communicate with your team and with district and club leaders. Your goal is not to tell members how to work with Rotary, but rather to convey that Rotary offers a variety of programs, resources, and tools that are useful in meeting clubs' and districts' overall service and fundraising goals.

Communication styles are personal and cultural, so we encourage you to tailor a plan for your team that addresses how and when you'll communicate. Consider what you want to communicate and the most effective way to do so.

Work with your predecessor, director, trustee (if appropriate), regional leader team, and assistants (if applicable) to develop a plan that works for everyone. Refer to the planning calendar in appendix 1 for suggestions about dates related to your communication plan.

## **Communication Channels**

You can communicate with Rotarians in your region using the platform you think best. Typical forms of communication include email, phone, Skype, and text messaging, but other platforms may be more effective in your region. Make sure your communication method is the appropriate one in each case. For example:

- Use blogs or newsletters to reach district leaders and tell success stories from your region to other members.
- Follow regional or district discussion groups on My Rotary and join in the conversation.
- Use social media sites to boost awareness of ongoing efforts and campaigns.
- Send a personal email or call a district that is struggling or has done an exceptional job; the district is likely to appreciate your efforts.
- Use webinars and other online training methods to give updates quickly and effectively with a team that may be geographically dispersed.

**Regional Rotary Foundation coordinators** — encourage clubs and districts to share their grant projects on Rotary Showcase. Promote Rotary's End Polio Now efforts, especially the Make History Today campaign, on social media and in your communications to districts. In your newsletters, recognize districts that have donated to PolioPlus or the Rotary Peace Centers.

**Regional coordinators** — encourage clubs and districts to share their projects on Rotary Showcase and social media. Promote and recognize innovative membership strategies, vibrant club meetings, or exciting service activities happening in your districts as examples for others to adopt.

**Rotary public image coordinators** — identify key audiences and develop an approach for reaching them. Share press releases and Rotary information with the regional media, making sure you tell the Rotary story in a way that appeals to nonmembers. Promote yourself as a resource who can consult on internally focused communications, such as a club newsletter, in addition to externally facing club and district websites.

**Endowment/major gifts advisers** — keep districts informed of new Major Donors and Bequest Society members and share opportunities for major gifts. Promote Rotary's End Polio Now efforts, especially ways to make major gifts through the Make History Today campaign, and the Rotary Peace Centers Major Gifts Initiative. Encourage districts and clubs to hold an event to cultivate or recognize major gift donors, and offer your assistance.

Communication goes both ways. Encourage your districts to share their ideas, success stories, or concerns to you. You're in an excellent position to pass this information not only to other

districts, but also to Rotary senior leaders and staff. Success stories and key strategies shared with staff can be integrated into the regional leaders workgroup.

In addition to sharing your regional successes with senior leaders and staff, consider sharing photos and success stories in your role's Facebook group. Your Facebook groups are an excellent way for you to keep connecting with fellow regional leaders and learning from them.

## **Rotary Communications and Tools**

Several resources can keep you current on Rotary information and the activities of other regional leaders.

### **Communiqué**

The monthly Communiqué newsletter, sent to all regional leaders and assistants, as well as senior leaders, has important updates, new resources, fundraising figures, and success stories that you can use in your own communications.

### **Rotary workgroup**

The regional leaders workgroup is a download library with training materials, reference documents, contact information, and other resources related to your role. The workgroup is accessible to regional leaders, assistant coordinators, and senior leaders. To reach the workgroup, sign in to My Rotary, view your profile, and go to Rotary Workgroups.

### **Rotary's social tools**

Rotary and Rotaract members can join and create [discussion groups](#) on My Rotary to share strategies, discuss upcoming projects, and engage with members of the Rotary community around the world. Groups can be open or invitation-only. We encourage you to join discussion groups related to your areas of expertise and your role, to begin connecting with other regional leaders and Rotarians.

### **Webinars**

Webinars organized by Rotary staff throughout the year keep you current on information from Rotary. Register for [upcoming webinars](#) and view archived recordings on [Rotary.org](#).

## 10. BUDGET

---

Each regional leader receives a budget to reimburse eligible expenses throughout the year. You'll be notified of the final amount of your budget by 1 July, after the Trustees and Directors have approved it. You're responsible for using your budget within Rotary's travel and reimbursement guidelines, determining how to use your Rotary funds throughout the year and choosing which invitations to accept and which activities to join.

Send all expense reports directly to Rotary's Accounts Payable Department at [expensereports@rotary.org](mailto:expensereports@rotary.org). The accounts payable team can answer your expense report questions and will work with you throughout the reimbursement process for any additional information that may be needed. Please continue to identify your role as a regional leader and your staff specialist on the report. To be processed, expense reports need to be submitted electronically, preferably as PDFs, via email to Accounts Payable.

All Rotary travelers need to follow [Rotary's travel policy](#), which includes guidelines for expenses and reimbursement.

### Travel and Expenses

If you have questions about the eligibility of an expense, contact your staff specialist before seeking reimbursement. Your staff specialist will remain your point of contact for any budget balance questions. Please visit the Travel & Expenses page on My Rotary for expense report forms, official Rotary International exchange rates, mileage reimbursement rates, and other relevant information. You can learn more about travel and expenses at [learn.rotary.org](http://learn.rotary.org).

As a reminder, submit your expense reports within 60 days from the last date of travel or when your expense was incurred, within the same Rotary year. No expenses submitted after 60 days will be eligible for reimbursement.

Expenses eligible for reimbursement include:

- Economy or coach airfare purchased through Rotary International Travel Service or bought locally with RITS approval
- Lodging (hotel folio is required)
- Meals
- Round-trip auto mileage or train fare up to \$350 (mileage greater than \$350 requires RITS preapproval)

- Meeting registration fees
- Venue or equipment rental fees
- Printing and postage for Rotary-related materials (newsletters, training materials, etc.)
- Phone, fax, internet, and webinar license fees

The budget:

- Covers only costs associated with your role as a regional leader, not those related to other Rotary positions or assignments.
- Will not cover your attendance at the Rotary International Convention.
- Will not cover your attendance at presidential conferences, unless previously approved as an exception.
- Will not carry over unused funds to the following year's budget.
- Follows the RI travel policy that requires flights to be booked through RITS and affiliate offices. If you find a fare that's at least \$300 less than the fare offered by RITS, you may be allowed to buy it, but you need to obtain RITS approval first.
- Requires RITS preapproval if travel costs for ground transportation (train, bus, and car) exceed \$350 round-trip. Before you drive, calculate the mileage reimbursement to confirm that it is less than \$350 round-trip.
- Will fund the following year's assistant coordinator training out of the current year's budget for regional Rotary Foundation coordinators, Rotary coordinators, and Rotary public image coordinators. If you are in your final year as an RRFC, RC, or RPIC, your budget will fund your successor's assistant training. Work with your successor well in advance to calculate the cost of funding that training.
- Cannot reimburse spouses' expenses.
- Meetings  
Your budget will be used to fund **your** participation in the following meetings:
  - GETS / Rotary Institute
  - Fieldwork / district support in your assigned region
  - Your regional seminar(s)

Here are some strategies for travel and expense reporting:

- Copy your staff specialist on all travel requests being sent to RITS.
- Specify use of either miles or kilometers.
- Remember to use RITS or consult with RITS before buying an air ticket yourself.
- Buy locally, if you have RITS approval, and attach documentation of the approval.
- Check receipt images for clarity when including them in an email.
- Make sure your hotel folio shows a zero balance. If it doesn't, you must also provide proof of payment, such as a credit card statement.
- Remove all but the final four digits on an account number when sending credit cards or bank statements, to ensure your data security.
- Substitute an email signature for the signature on the report if necessary. If you are submitting a report on behalf of an assistant, you will also need to submit the assistant's signature.
- Track your expenses and submit expense reports within 60 days of the expense.

Please do not send payee forms to your staff specialists.

If you're a regional Rotary Foundation coordinator, Rotary coordinator, or Rotary public image coordinator, your budget includes funding for your assistants. You're responsible for ensuring your assistants follow the guidelines above. Assistants should also copy you on all travel request and expense report emails. Failure to copy you on requests slows the approval process, delaying travel booking or reimbursements.

Because funding is limited, your budget may not cover all of your and your assistants' expenses. This means that you may face difficult decisions about where you will travel, and that you may not be able to visit all of your districts each year.

Rotary will provide reimbursements directly to the person who paid the expense. For example, if you assign an assistant to attend a district conference and agree to fund a two-night hotel stay through your budget, your assistant should arrange to pay the hotel directly so he or she can provide proof of payment to Rotary.

## APPENDIX 1: REGIONAL LEADERS' PLANNING CALENDAR

This calendar includes items for incoming and current regional leaders leading up to and during the year of service. You may want to add your own dates and notes to help you in later years.

DATE	ROLE	ACTION	NOTES
<b>Ongoing</b>	RRFC RC RPIC E/MGA	Host regular conference calls or webinars with your team members.	Use this opportunity to motivate and collaborate with team members, organize zone and district events, discuss concerns, and assign responsibilities.
<b>January</b>	RRFC RC RPIC	Make a list of prospective assistants. Your staff specialist will contact you about appointing your assistants.	Consider language ability, geographic location, expertise and your budget.
<b>February</b>	RRFC RC RPIC E/MGA	Contact governors-elect and incoming district committee chairs.	Open or maintain communication with the district leaders who will work with you. Consider collaborating with your regional leader team on a joint communication.
<b>February-April</b>	RRFC RC RPIC	Participate in the presidents-elect training seminar and district assemblies.	The budget year begins 1 July, so the outgoing leaders' budgets must cover the expenses of incoming leaders.
	RRFC RC RPIC	Complete the assistant selection form online.	Rotary staff will email a link to the form and will review selections for eligibility to serve.
<b>March</b>	RRFC RC RPIC (incoming only)	Attend the Regional Leaders Training Institute.	Incoming RRFCs, RCs, and RPICs attend. All regional leaders receive institute training materials for the latest information on fund development programs, grants, member engagement, strategic planning,

DATE	ROLE	ACTION	NOTES
			public image, and more.
	RRFC RC RPIC E/MGA	Work with your director, trustee, or regional leader team to develop and establish a communication plan.	Consider developing a strategy for both internal and external communications. How will you communicate with district leaders as a team?
	RRFC	With district leaders and other coordinators, identify candidates for the Rotary Alumni Global Service and Alumni Association of the Year awards.	Submit nomination forms by 30 June.
<b>April</b>	E/MGA (incoming and first years only)	Attend the Endowment/Major Gifts Training Institute.	All regional leaders receive institute training materials for the latest information on the endowment, major gifts, skill building, and more.
	RRFC RC RPIC E/MGA	Follow up with district leaders you have met. Ask how you can help them.	Talk with districts about their needs and plans for the new year.
	RRFC RC RPIC	Begin planning for regional and multidistrict seminars.	The secrets to good turnout are plenty of notice and active promotion of the event. Begin working with your convener.
	RRFC RC RPIC E/MGA (current only)	Complete report.	Your staff specialist will send a link to the report.
	RRFC	Contact any districts that haven't appointed district Rotary Foundation committee chairs.	Districts cannot qualify to participate in Foundation grants without a current chair.

DATE	ROLE	ACTION	NOTES
	RC	Encourage districts and clubs to participate in the Rotary Citation for the coming year. Remind them to monitor progress on their district and club dashboards.	The Rotary Citation is awarded for accomplishments through 30 June.
<b>April-June</b>	RRFC RC RPIC	Conduct training for your zone team or assistants and, if applicable, committee chairs.	This training ensures that team members and district leaders know about Foundation grants, public image efforts, and membership engagement, and that they are aware of procedures.
	RRFC RC RPIC	Plan for GETS, the regional Rotary Foundation seminar, or any other meetings held in conjunction with the Rotary institute.	This is a good time to raise the profile of your assistants and other members of your zone team. Ask your E/MGA and assistants how you can support their efforts.
<b>May</b>	RC RRFC	Encourage club leaders to submit their membership and Foundation giving goals in Rotary Club Central to earn the Rotary Citation.	1 May: Deadline for submitting membership and Foundation giving goals through Rotary Club Central.
<b>May-June</b>	RRFC	Send year-end reminders to districts and offer to help them meet their annual giving goals.	June sees the highest volume of contributions to the Foundation. Encourage clubs and districts to submit their contributions by mid-June to avoid recognition delays.
	RRFC RC RPIC E/MGA	Work with your director, trustee, or regional leader team to develop targets and action plans for your regional leader goals.	Rotary staff will send an email with a link to submit your target and action plans.
<b>June</b>	RC	Encourage club leaders to submit their goals in Rotary Club Central to earn the Rotary Citation.	Deadline for submitting club membership goals in Rotary Club Central.

DATE	ROLE	ACTION	NOTES
	RRFC RC RPIC E/MGA	Complete report.	Your staff specialist will send a link to the report.
<b>July</b>	RRFC RC RPIC E/MGA	Receive confirmation of budget amount from RI.	
	RRFC RC RPIC E/MGA	Send a motivational message to all district leaders to mark the start of the Rotary year.	
	RRFC E/MGA	Lead by example and make your annual gift.	Consider making a one-time gift or enrolling in Rotary Direct, our recurring giving program, at <a href="http://www.rotary.org/give">www.rotary.org/give</a> .
	RRFC RC RPIC	Decide dates for district and multidistrict seminars.	RRFCs: The Trustees encourage each district to hold a district Rotary Foundation seminar as early in the Rotary year as possible, and no later than 15 November.
	RRFC	Send congratulations to those who have achieved their Foundation goals.	Consult online contribution reports to confirm district accomplishments, such as 100 percent of clubs contributing or Annual Fund per-capita giving of \$100.
<b>July-September</b>	RRFC	Promote leadership gifts from district and club leaders.	Help districts and clubs start their fundraising strong by having leadership teams make their Every Rotarian, Every Year gifts at the start of the year.
	RC	Identify and promote successful projects.	Encourage clubs and districts to promote their projects on Rotary Showcase.

DATE	ROLE	ACTION	NOTES
	RRFC RC RPIC E/MGA	Staff announces appointment of incoming regional leaders.	Share the announcement with your districts and prepare them for a smooth transition of leadership, if applicable.
	RRFC RC RPIC	Encourage districts to set their membership, fundraising, service, and public relations goals in Rotary Club Central.	
	RRFC RPIC	Encourage districts to begin planning for World Polio Day on 24 October.	You might offer support in planning or promoting an event, contacting regional media, or encouraging donations.
<b>August</b>	RC	Organize an event or activity for Membership and New Club Development Month.	
<b>August-December</b>	RRFC RC RPIC	Hold regional Rotary Foundation seminars and regional seminars.	
	E/MGA	Hold a Major Donor thank-you event in conjunction with a Rotary institute.	
	RRFC RC RPIC	Serve as a training team member at GETS and Rotary institutes.	Serve only if the convener invites you to be a trainer.
<b>September</b>	RRFC E/MGA	Encourage districts to begin planning for Rotary Foundation Month in November.	Offer suggestions for special activities or speakers.
	RRFC E/MGA	Begin actively promoting year-end gifts.	Though many Rotarians make their gifts in December, they often begin their gift planning now.

DATE	ROLE	ACTION	NOTES
<b>October</b>	RRFC RC RPIC E/MGA	Support World Polio Day on 24 October.	RPICs: Share successes and events in your districts with local media and RI. RRFCs and RCs: Promote Rotary's activities around the world. E/MGAs: Use World Polio Day as a catalyst for meeting with a prospect interested in the cause.
	RRFC RC RPIC E/MGA	Complete first report.	Staff will send a link to the report.
<b>November</b>	RRFC E/MGA	Continue to promote year-end giving.	
	RRFC E/MGA	To mark Rotary Foundation Month, encourage each district to ensure that its clubs plan at least one Foundation-related program.	Clubs and districts can: <ul style="list-style-type: none"> <li>▪ Invite Rotary alumni to speak at programs.</li> <li>▪ Use videos (available online and at <a href="http://shop.rotary.org">shop.rotary.org</a>) to highlight inspiring Foundation projects.</li> <li>▪ Recognize donors.</li> <li>▪ Begin a grant-funded activity.</li> <li>▪ Participate in a PolioPlus project.</li> <li>▪ Contact clubs that have not yet contributed to the Foundation and ask them to make a gift in November.</li> <li>▪ Promote articles from The Rotarian and Rotary Leader about successful Foundation projects.</li> </ul>
<b>December</b>	RRFC E/MGA	Promote year-end gifts.	The end of the calendar year is an important time for individual giving.

DATE	ROLE	ACTION	NOTES
	RRFC RC RPIC	Begin discussions with district governors-elect about setting club goals in Rotary Club Central as they prepare for the presidents-elect training seminar.	With support from your zone team and assistants, ensure that your districts are prepared to submit goals during the presidents-elect training seminar or no later than 1 May.
<b>January</b>	RRFC RC RPIC	Promote the new presidential theme, announced at the International Assembly.	Tie the theme to Rotary's initiatives.
	RRFC RC RPIC	Encourage clubs to celebrate Rotary's anniversary on 23 February.	RPICs: Encourage clubs to incorporate local media outreach as they plan events and projects around this date.
	RRFC RC RPIC	Complete second report.	Staff will send a link to the report.

## APPENDIX 2: TRAINING SEMINARS

TRAINING MEETING AND TIMING	PURPOSE	CONVENER AND ORGANIZER	MATERIALS can be found on the <a href="#">learn by role</a> page, under Learning & Reference, on My Rotary
<p><b>Team training</b> Determined by the zone team</p>	<p>Assistants and members of your team learn about your expectations for the year.</p>	<p><b>Convener:</b> RRFC, RC, or RPIC</p>	<p>Zone Team Training manual (RRFC), Assistant Training Manual (RC/RPIC). (found on the Regional Leaders Workgroup)</p>
<p><b>Regional seminar</b> Held in conjunction with GETS and Rotary institute, or at another time as appropriate</p>	<p>Club and district leaders learn about zone-level initiatives, and goals are introduced to their regional leader team.</p>	<p><b>Convener:</b> RRFC, RC, or RPIC</p>	<p><b>For leaders:</b> See sample joint regional agenda on the Regional Leaders Workgroup</p>
<p><b>Regional Rotary Foundation seminar</b> Held in conjunction with the governors-elect training seminar and Rotary institute</p>	<p>Club and district leaders learn about zone-level Rotary Foundation initiatives, and goals are introduced to their regional leader team.</p>	<p><b>Convener:</b> RRFC</p>	<p><b>For leaders:</b> <a href="#">Lead Your District: Rotary Foundation Committee Manual</a> <b>For participants:</b> <a href="#">Lead Your District: Rotary Foundation Committee Manual</a></p>
<p><b>Governors-elect training seminar (GETS)</b> August-December; regional training in conjunction with Rotary institute</p>	<p>Governors-elect learn about their responsibilities.</p>	<p><b>Convener:</b> RI director or immediate past director</p>	<p><b>For leaders:</b> <a href="#">Governors-elect Training Seminar Leader's Guide</a> <b>For participants:</b> <a href="#">Lead Your District: Governor</a></p>
<p><b>International Assembly</b> Before 15 February</p>	<p>Governors-elect receive instruction, motivation, and inspiration. Learning builds on GETS.</p>	<p><b>Conveners:</b> RI president and president-elect <b>Organizer:</b> Moderator</p>	<p><b>For leaders:</b> <a href="#">International Assembly Leader's Guide</a> <b>For participants:</b> <a href="#">Governor-elect Workbook</a></p>

TRAINING MEETING AND TIMING	PURPOSE	CONVENER AND ORGANIZER	MATERIALS can be found on the <a href="#">learn by role</a> page, under Learning & Reference, on My Rotary
<b>District team training seminar</b> February	Assistant governors and district committee leaders learn about their roles and goals with the district leadership team.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <a href="#">District Team Training Seminar Leader's Guide</a> <b>For participants:</b> Lead Your District manuals for <a href="#">assistant governors</a> and <a href="#">district committees</a>
<b>Presidents-elect training seminar (PETS)</b> February or March	Club presidents-elect learn their role and work on their goals with governors and assistant governors.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <a href="#">Presidents-elect Training Seminar Leader's Guide</a> <b>For participants:</b> <a href="#">Lead Your Club: President</a>
<b>District training assembly</b> March, April, or May (after president-elect training seminar)	Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; club leaders set goals.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <a href="#">District Training Assembly Leader's Guide</a> <b>For participants:</b> Lead Your Club manuals for <a href="#">president</a> , <a href="#">secretary</a> , <a href="#">treasurer</a> , and <a href="#">committees</a>
<b>District membership seminar</b> April or May (after district training assembly)	Club president and membership committee chair, interested Rotarians, and district leaders learn about membership.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District membership committee	<b>For leaders:</b> <a href="#">District Membership Seminar Leaders' Guide</a> <b>For participants:</b> <a href="#">Strengthening Your Membership</a>
<b>District Rotary Foundation seminar</b> July-November	Club Rotary Foundation committee chairs and interested Rotarians learn about The Rotary Foundation.	<b>Convener:</b> Governor <b>Organizer:</b> District Rotary Foundation committee, district training committee, and RRFC	<b>For leaders:</b> <a href="#">District Rotary Foundation Seminar Leader's Guide</a> <b>For participants:</b> <a href="#">Lead Your Club: Rotary Foundation Committee</a>
<b>District public image seminar</b> Determined by the district	Club and district leaders and interested members learn how to enhance Rotary's public image.	<b>Convener:</b> Governor <b>Organizer:</b> District training committee	<b>For leaders:</b> <a href="#">District Public Image Seminar Guide</a>

TRAINING MEETING AND TIMING	PURPOSE	CONVENER AND ORGANIZER	MATERIALS can be found on the <a href="#">learn by role</a> page, under Learning & Reference, on My Rotary
<p><b>Grant management seminar for club members</b> Determined by the district</p>	<p>Club members learn about successfully managing Rotary grants (attendance is required for club qualification).</p>	<p><b>Convener:</b> Governor-elect <b>Organizer:</b> District Rotary Foundation committee chair, grants subcommittee chair, and training committee</p>	<p><b>For leaders:</b> <a href="#">Grant Management Seminar Leader's Guide</a> <b>For participants:</b> <a href="#">Guide to Global Grants</a></p>
<p><b>Leadership development program</b> Determined by the club</p>	<p>Club members gain skills for their professional work and leadership roles in Rotary.</p>	<p><b>Organizer:</b> Club trainer, president, assistant governor, or district training committee</p>	<p><b>For leaders:</b> <a href="#">Leadership in Action</a> <b>For participants:</b> Determined by the district</p>
<p><b>District leadership seminar</b> Immediately before or after the district conference</p>	<p>Current or past club presidents and other club leaders who have served for three or more years learn about leadership opportunities in Rotary.</p>	<p><b>Convener:</b> Governor <b>Organizer:</b> District training committee</p>	<p><b>For leaders:</b> <a href="#">District Leadership Seminar Guide</a> <b>For participants:</b> Determined by the district</p>
<p><b>District conference</b> Any time except during a Rotary institute or within eight days of the Rotary Convention</p>	<p>All Rotarians in the district can meet and hear from leaders, and discuss district matters.</p>	<p><b>Convener:</b> Governor <b>Organizer:</b> District training committee</p>	<p><b>For organizers:</b> <a href="#">District Conference Manual</a> <b>For participants:</b> Determined by the district</p>
<p><b>Grant management seminar for club president-elects</b> Determined by the district</p>	<p>Club presidents-elect (or club-designated appointees) learn how to manage Rotary Foundation grants (attendance is required for club qualification).</p>	<p><b>Convener:</b> Governor-elect</p>	<p><b>For leaders:</b> <a href="#">Grant Management Seminar Leaders' Guide</a> <b>For participants:</b> <a href="#">A Guide to Global Grants</a></p>
<p><b>Rotaract district leadership training meeting</b> Any time after clubs' open elections and before 30 June</p>	<p>Incoming Rotaract club leaders, Rotaractors, interested Rotarians, and non-Rotarians learn more about Rotaract.</p>	<p><b>Convener:</b> Governor <b>Organizer:</b> District Rotaract representative</p>	<p><a href="#">Guide for District Rotaract Representatives</a></p>



One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)

EN-(217)