



# One Rotary Summit Participant Workbook

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## Welcome to the One Rotary Summit!

We are so glad you're joining us today! The One Rotary Summit is a synergistic learning experience asking all of you, the participants, to work together to develop creative solutions to some relatable Rotary case studies. You'll work on teams and be presented with two case studies all of which ask you to leverage tools and information in relation to Membership, Public Image and The Rotary Foundation. We want you to think outside the box! We all know that when it comes to our Club's there's not a one-size-fits-all approach, so let's get creative!

## Team Assignment Card

Please make sure you received a Team Assignment Card. This small piece of paper/card will have a number, color and a letter written on it for you. The information on this card will determine what team you are assigned to for today's summit!

## Workbook Contents

This workbook is yours to keep! Please take detailed notes throughout the Summit so you can take back this valuable information to your club. In this workbook you'll find:

- Case Studies for group work – you will be given more direction from the Facilitator
- Case Study worksheets – you will be given more direction from the Facilitator
- Relevant tools and information – for you to take home with you
- Action plan worksheet

### Case Study #1

For a Rotary Club to truly provide Service Above Self it is critical to review current practices related to public image, membership development, community service (local and international) the culture of TRF giving and to create a plan to build on current strengths and to address identified weaknesses.

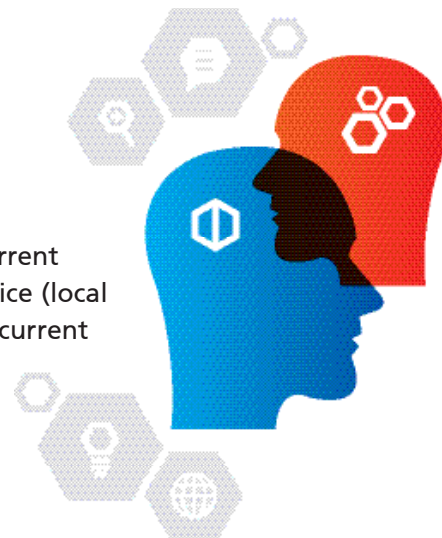
#### CLUB CHART

(The Club Chart is a brief overview of club data that may be insightful for you as you work on this case study)

- Club founded in 1917
- Annual giving to The Rotary Foundation's Annual Fund is an average of \$73 per member per year + average of \$25 per member to PolioPlus. The club has 3 PHF Society members (donating \$1000 per year) and 59% are PHF. Only 4% have never donated to the Rotary Foundation
- Annual Dues are \$900.00 including lunch (you pay for your \$16 lunch whether you attend the meeting or not)
- Demographics:
  - 62% male / 38% women
  - 35% of members 60 years or older
  - 41% of members ages 50 - 59
  - 18% of members ages 40 - 49
  - 6% of members ages 30 - 39

#### SCENARIO

- The culture of your club feels welcoming, high-energy and fun but it hasn't had much success getting/keeping members, especially under the age of 40.
- Younger guests have visited, but your club hasn't been able to get any of those visitors to move to the membership application phase.
- Current members in the 40-49 age range show enthusiasm for membership at first, but often do not show up for regular weekly meetings and some have left the club within a few years.
- Members in the 50- 59 age range attend meetings when possible, are willing to serve on club committees and enjoy getting engaged in one or more of the club's signature activities throughout the year.
- Those members in the 60 and up age range tend to be the most consistent attendees at weekly meetings, although their participation in activities and events varies greatly.
- Most members believe the club is very active, providing dictionaries to 3rd graders, a scholarship to a high school student, and providing financial support to a sister club's global grant year to year. Annually, you conduct two fundraisers, ring the bell for the Salvation Army, collect canned goods and perform highway clean ups.
- You also sponsor one Interact club and co-sponsor a Rotaract club with a neighboring Rotary club. From what you have heard, the Rotaract club is struggling with membership and hasn't had much growth either.
- Your club President has mentioned a few times now that he is feeling pressure to improve the club's membership and the community's awareness of your existence so he has asked members to start bringing more guests by asking friends, colleagues and peers and to generate ideas to improve club members' involvement.



# Case Study #1 Worksheet

Complete the worksheet with your team (we encourage everyone to fill in their worksheet as a great tool to take home.)

As a group, using the information given and the One Rotary concept, develop a plan that can address the above concerns and can accomplish the following (be creative):

- Increase membership attraction and engagement
  - Increase public awareness of the club and its activities
  - Enhance community service and increase public support for your service projects
- \*Note: What resources might be available to assist your club to help with your plan of action?

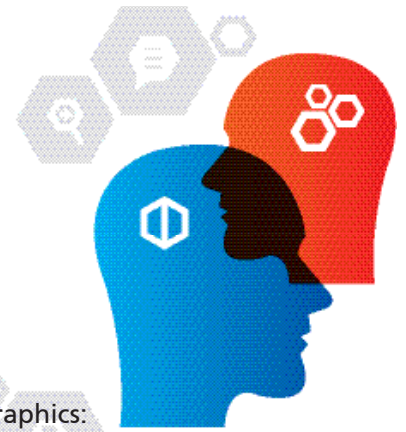
### Case Study #2

Rotary International's Strategic Plan calls for RI and District leaders to support and strengthen clubs, for clubs to focus and increase humanitarian service, and for all Rotarians to enhance Rotary's public image and awareness.

#### CLUB CHART

(The Club Chart is a brief overview of club data that may be insightful for you as you work on this case study)

- Club founded in 1975
  - Giving to The Rotary Foundation's Annual Fund is an average of \$61 per member per year + an average of \$30 per member to PolioPlus. The club also gives a donation to PolioPlus each year, varying in amount and depending on their budget.
  - Annual dues are \$550, but do not include lunch (\$10/meeting; pay as you go)
  - Average attendance has been hovering around 55%
- Demographics:
    - Club membership (vacillating between 26 and 32/currently at 29) reflects senior leadership in the community including local schools, public libraries, the community foundation, several large businesses, dentists, the local hospital and the Chamber of Commerce and is:
      - 66% male / 34% women
      - 62% of members are 50 and older
      - 30% of members are 40-49
      - 8% of members are 30-39



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#### SCENARIO

- The District Governor has challenged every club to start gearing up for the 100th anniversary of The Rotary Foundation in 2016-17 by raising public awareness of The Rotary Foundation supported service.
- Since a milestone has been reached with the polio eradication success in Nigeria, your club's leadership has asked the members to support an event on 23 October, World Polio Day, and 23 February, the anniversary date of Rotary and our PolioPlus Campaign, to help promote Rotary's "End Polio Now" movement. To get things started, one of the members came up with the idea to ask local merchants to participate by agreeing to donate one percent of sales to PolioPlus on the dates selected.
- The club's only plan for communication/PR is to put an announcement in the local newspaper, post the event on Facebook and put some information on the club website prior to the event by updating materials they have used for the last five years.
- The club members realize this is an opportunity to create community involvement in fundraising efforts to support The Rotary Foundation and the "End Polio Now" campaign and to make this day "fun and appealing to the non-Rotary public."

# Case Study #2 Worksheet

Complete the worksheet with your team (we encourage everyone to fill in their worksheet as a great tool to take home.)

As a group, using the information given and the One Rotary concept, develop a plan of action that can improve the ideas/plan above including:

- How could your club tell the Rotary story more effectively via this fundraiser?
  - What could your club do to capitalize on this project to potentially attract new members at the same time?
  - What action steps can your club take to improve your future fundraising efforts, Rotary Foundation supported service, member attraction and public awareness of Rotary in general?
- \*Note: What resources might be available to assist your club to help with your plan of action?

## Personal Action Plan

Take a few minutes to write down at least one thing you plan to do when you get back to your club.



## Additional Resources

Most of the items referenced are available online. To download a copy of this document with live links, please go to [www.tinyurl.com/onerotary-participant](http://www.tinyurl.com/onerotary-participant). Download the One Rotary Summit Additional Resources document.

CATEGORY	RESOURCE
<b>Online tools</b> To track progress on goals, promote and support projects, download templates, find a club, or connect with Rotary on social media	<ul style="list-style-type: none"> <li>• <a href="#">Rotary Club Central</a></li> <li>• <a href="#">Rotary Brand Center</a></li> <li>• <a href="#">Rotary Showcase</a></li> <li>• <a href="#">Rotary Ideas</a> Rotary's social media pages (<a href="#">Facebook</a>, <a href="#">Twitter</a>, <a href="#">LinkedIn</a>, <a href="#">Vimeo</a>, and <a href="#">Instagram</a>)</li> </ul>
<b>Membership</b> To help you support membership activities around the world	<ul style="list-style-type: none"> <li>• <a href="#">Membership</a> page</li> <li>• <a href="#">Be a Vibrant Club: Your Club Leadership Plan on Rotary.org</a></li> <li>• <a href="#">Strengthening Your Membership: Creating Your Membership Development Plan</a></li> <li>• <a href="#">Membership Assessment Tools</a></li> <li>• <a href="#">Strategies for Attracting and Engaging Members</a></li> <li>• <a href="#">Connect for Good</a></li> <li>• <a href="#">Membership Minute newsletter</a></li> <li>• <a href="#">Membership Best Practices Discussion Group</a></li> <li>• District alumni reports</li> <li>• <a href="#">Club Finder</a></li> </ul>
<b>Annual Fund</b> To secure support for The Rotary Foundation	<ul style="list-style-type: none"> <li>• <a href="#">Rotary's secure online giving system</a></li> <li>• The Rotary Foundation <a href="#">contribution form</a></li> <li>• <a href="#">Every Rotarian, Every Year brochure</a></li> <li>• <a href="#">Paul Harris Society brochure</a></li> <li>• <a href="#">Rotary Giving &amp; Grants newsletter</a></li> <li>• <a href="#">Rotary Foundation Reference Guide</a></li> </ul>
<b>Endowment Fund</b> To share Rotary's Endowment and Planned Giving opportunities with prospective donors	<ul style="list-style-type: none"> <li>• <a href="#">Endowment Fund page</a></li> <li>• <a href="#">Ways to Give brochure</a></li> <li>• <a href="#">Major Gifts, Major Impact</a></li> <li>• <a href="#">Your Rotary Legacy</a></li> <li>• <a href="#">Rotary Peace Fellowships brochure</a></li> </ul>
<b>Polio Plus</b> To keep current on Rotary's fight to end polio	<ul style="list-style-type: none"> <li>• <a href="#">End Polio Now website</a></li> <li>• <a href="#">Make History Now campaign resources</a></li> <li>• <a href="#">End Polio Now newsletter</a></li> <li>• <a href="#">Global Polio Eradication Initiative website</a></li> </ul>



### Additional Resources

CATEGORY	RESOURCE
<b>Rotary Grants</b> To help district leaders write winning grant proposals	<ul style="list-style-type: none"><li>• <a href="#">Rotary Grants section</a></li><li>• <a href="#">Grant Management Manual</a></li><li>• <a href="#">District Rotary Foundation Seminar Leader's Guide</a></li><li>• <a href="#">District</a> and <a href="#">club</a> MOUs</li><li>• <a href="#">Rotary Giving &amp; Grants newsletter</a></li></ul>
<b>Projects</b> To help clubs and districts who want to plan better projects	<ul style="list-style-type: none"><li>• <a href="#">Lifecycle of a Service Project webinar series</a></li></ul>
<b>Club Vision</b> To get leaders started with planning activities	<ul style="list-style-type: none"><li>• <a href="#">Strategic Planning Guide</a></li><li>• <a href="#">Leadership Development: Your Guide to Starting a Program</a></li></ul>
<b>Public image</b> To strengthen Rotary's public image with your community	<ul style="list-style-type: none"><li>• <a href="#">Public Relations page</a></li><li>• <a href="#">Rotary Club Central</a></li><li>• <a href="#">Voice and Visual Identity Guidelines for Rotarians</a></li><li>• <a href="#">Effective Public Relations</a></li><li>• <a href="#">Club Public Relations Committee Manual</a></li><li>• <a href="#">What's Rotary?</a></li><li>• <a href="#">Quick Start Guide for Club Websites</a></li><li>• Social media courses in the <a href="#">Learning Center</a></li></ul>

