

**ALL OHIO PETS**  
**SUMMARY OF BREAKOUT SESSIONS**  
**March 11 & 12, 2005**  
**Columbus, Ohio**

**Session I: The Rotary International Foundation**

Up to 50 Members:

- 5 for 5 Club (Logan): 5 members do \$200 donation per year x 5 = \$1,000; then draw one name for Paul Harris
- 4x4 plan: 4 members contribute \$200 each and club contributes \$200; in 4 years all are Paul Harris Fellows
- Members commit \$20/month; when fund reaches \$1,000 one name is drawn to become Paul Harris Fellow
- Part of initiation fee goes to Paul Harris for 1<sup>st</sup> year
- Point system: have club award points for participation in club service, perfect attendance; \$1 per point is paid by club for Paul Harris Fellow
- Focus on every club member joining together to achieve club goal of 100%
- Put on seminars for membership; educate members
- Dues invoice has check-off for Foundation
- Past presidents honored with Paul Harris fellowship
- Small clubs committed to the Foundation
- Make visible what your projects have done so members know where their money goes
- Keep EREY upfront
- Paul Harris points available for transfer to other people
- Permanent fund and bequest society
- Set and publicize club goal and progress
- Identify international project and seek and international partner club and matching funds from TRF
- Availability of RI information on the web site, but hard to navigate
- Include Foundation presentations in club programs – ambassadorial scholars; GSE teams
- Committed older Rotarians influence younger club members to participate
- Matching grant rules & procedures confusing; invite speaker who understands nuts & bolts of foundation to meeting
- Emphasize multiplier effect of matching grants
- Emphasize that money donated to the annual fund is returning to the district (50%) for clubs to use
- Find out what my club's history is with TRF
- Appoint foundation chair

### 51 – 100 Members:

- Resources on TRF: district foundation chair, Pre PETS book, District Governor, Assistant Governor, Rotary website, videos
- Emphasize service above self more than just giving
- Club members need to see tangible results and success stories
- Set club goals
- TRF Direct will be a big help
- Emphasize how TRF has changed the world and changed lives, i.e. Polio Plus
- Have an RI item every week
- Membership dues include \$100 gift to TRF unless member “opts out”
- Several club members provide matching funds
- Educate members
- Send RI club chairs to district assembly or meeting to learn about grants
- Read the RI club manual for fundraising ideas
- RI grants have red tape and are slow; clubs hesitant to fill out applications
- International projects and trips by club members changes them from check writers to activists
- Find ways to tap into local club foundations for RI foundation gift

### 101 – 200 Members:

- To get RI grants, it is better if project is in an area of RI President’s priorities (literacy/water)
- Club can match foundation gifts; also utilize district
- Make sure RI projects are presented to the membership a couple of times a year; educate membership
- Get a club foundation chair to district assembly
- Look to district foundation chair for help
- Some concern about how to make the benefits relevant to membership
- Rotary.org – world community service exchange; search for partners by country or dollar amount
- Rotary.org – member access; club recognition summary report for club’s status
- Some clubs have fundraisers just for foundation giving
- Have TRF program once a quarter; a moment for TRF at each meeting
- Know your officer at RI as well as District chair

### 201+ Members:

- All but one club this size has its own foundation
- Need more education of members to address confusion
- Stagger giving times of Club and RI
- Elevator speech – articulate in 30 seconds the mission of the RI Foundation
- Does your club have an international project – PASSION
- We hit members for items and money many times. For RI, need a specific project
- Create grant writing committee and get one or two people in the club to write grants for optimizing money

- When does RI letter go out? It is signed by DG and creates a lot of confusion with members.

### **RI Foundation Follow-up Requested:**

- Questions about how to find club's status on website
- Would like a copy of the video
- Would like link to Dave Lusty's power point presentation
- District 6630 has CD available with TRF info: Frank Moore, 3701 Mayfield Rd., Cleveland 44121
- What is the RI Foundation calendar of fundraising. Clarify with clubs, so they can organize club fundraisers away from RI fundraising.
- RI needs to provide a template for the foundation for Rotary club websites
- Each district should have a speaker's bureau on the foundation
- District Governor's visit to club should include presentation of RI projects
- RI must make its grants application procedure efficient; suggest using internet interactive forms and faster decisions. This is most important source of ill will for RI and must be changed. Businessmen won't put up with inefficiency.
- Need to educate members regarding estate giving

### **Effective Projects**

#### Up to 50 Members:

- Important for club agreement on project; want club support
- Keep "little" projects going for club member interest
- Create flyer/brochure of clubs projects for community & membership use
- Looking for projects:
  - Community survey
  - Mayor
  - Fire Dept.
  - Schools
  - Historical society
  - Corporations
  - YMCA
  - Churches
  - Salvation Army
  - Youth Exchange
  - Look around your community
  - Other clubs
  - Community submits requests
- Have club members make presentations and have discussions
- How do you characterize effective service project:
  - Community needs assessment
  - Member involvement & support (also good for retention)
  - Fun!

- Annual event that grows in size and has participation of many people in the community, including non-Rotarians
- Evaluate periodically for viability
- Do one or a few well
- Satisfied Rotarians
- Community benefit
- Attaining desired results (measurable)
- For ongoing projects, have chair prepare a manual for subsequent chairs
- Consider project impact on club image (gambling, x-rated comedy act)
- Combine with other clubs to do projects
- Develop relationship with district to multiply advantages (March 31 deadline for grant applications)
- Integrated approach is important: service – fundraising – social
- Brainstorm projects in club assembly outside of normal meeting time
- Use projects as PR opportunity
- Involve spouses and children in projects
- Find the champion
- Meet with local officials annually to maintain an ongoing dialogue; goal is to become known as the solution provider, so the community comes to the club
- Club retreat; hold monthly club assemblies; bull session on same day as monthly board meetings
- Partner with other organizations

#### 51 – 100 Members:

- How do we choose projects?
  - Community assessment committee
  - Members bring projects to the board
  - Carry over from previous years
  - Projects come to us
  - One representative of each service club in community meet once a month to work together as one on large community projects
  - Community leader
- Establishing criteria for projects:
  - RI website
  - Visibility
  - Presidents Manual

Will club support the project or be able to do it physically?

  - Community involvement
  - Passion
  - Club member participation
- International projects
  - RI & District websites
  - Through exchange students
  - Community ties with foreign countries
  - Other club projects/partnerships
  - [www.zones27-28.org](http://www.zones27-28.org) (Liz Smith; tape of Children of the Dump)

- RI employees
- Make sure new members understand what the projects are
- Teach high school seniors about community service
- Involve Interact
- Evaluate projects – time and resources, community impact, visibility

#### 101 – 200 Members:

- What makes it effective?
  - Fulfill need
  - Good PR
  - Member involvement
  - Leadership
  - Planning
  - Quantifiable outcome
  - Budget
  - Partnering organizations
  - Completion
  - Involvement of new members
  - Evaluation
- Hands-on service vs. check writing – fellowship; getting to know each other; better relationships; generates more energy
- No cost projects – clothes drive, serve dinners for groups, blood drives, Salvation Army bell ringing, Adopt-a-Highway, Ohio READS
- Involve Rotaract & Interact
- Delegate!
- If you could, what is your vision to change things?
  - Have criteria for club to determine whether or not to do projects
  - 50% local community:50% international
  - Check history of club to possibly revive former projects from 25-30 years ago
  - Clearly defined goal
  - Partnerships with other local organizations
- Do projects requiring more time than money as well as projects requiring money; involve club at many levels

#### 201+ Members:

- See “Key Elements of Great Projects”, Rotary Club of Columbus, at end of this document
- Clubs are doing 3 to 5 year strategic plans, which include community needs assessments
- Key areas of success are:
  - Working with programs requiring community service hours
  - Moving away from check writing projects
- Need to do membership interest surveys as well as community needs assessments and then coordinate to find the fit

### **Service Project Follow-up Requested:**

- Clarify liability insurance through RI and what it covers
- Need for Directors and Officers insurance?

### **Membership**

#### Up to 50 Members:

- Set expectations before members join
- Target key people
- Classification review
- Quantity vs. quality
- “Exit interviews” of those who leave
- Orientation program for new members
- Visibility in community
- Quality of meeting and fellowship
- Need strong, enthusiastic membership development chair
- Don’t “beg” people to become members
- Develop brochure about club
- Make induction ceremony very important
- Consider nominating committee
- Assign mentors for new members
- Improve process of selecting and developing presidents elect
- Develop program to recruit younger members
- Follow up on multiple absences
- Look at lunch options to address cost issues; lay out costs up front with prospective members
- Increase make up opportunities
- Use of short-term leaves of absence

#### 51 – 100 Members:

- Budget for membership growth & members
- “Exit interview or survey” of those who leave – how can we improve our club to keep members?
- Make Rotary family friendly
- Fall-out in first 6 months of membership is high – wrong reasons for joining; don’t get involved
- President contacts new members monthly for first 4 months – How is it going? Do you have any questions?
- Introduce new members to avenues of service
- Target women, diversity, disadvantaged, retired
- Survey members for areas of interest & skills
- Assign mentor to new members
- Enthusiasm sells

- Family memberships that cost less than 2 memberships; reshape time
- “Terminate” members who are dead wood, but warn them first
- Create welcoming atmosphere
- Be flexible in allowing make-ups – board meetings, committee meetings, projects, district meetings

#### 101 – 200 Members:

- Membership chair is vital
- Classification survey – know your list of occupations to fill and use it recruitment, but be creative in classification
- Be clear about expectations with prospective Rotarians – attendance requirements, costs
- Target diversity
- New member orientation
- New member handbook
- Link individual interests with areas of involvement
- Education and passion are key words
- Have good meetings for retention/keep their interest
- How many clubs help out financially strapped members with dues and meals requirements?

#### 201+ Members:

- Assign new members to a project
- “New Member Club” to design and implement project
- Measure of membership is not members but quality of participation
- Fun is key to retention

## **The Rotary Club of Columbus Project Guidelines**

The Board of Directors is responsible for the initiation or continuation of a Rotary project. Recommendations to the Board of Directors for the initiation or continuation of Rotary projects will come from a Club committee after appropriate review and study. The initiation or continuation of a Rotary project shall be based on the following criteria:

- ✓ Be consistent with the Strategic Plan
- ✓ Satisfy a need in the Greater Columbus community or provide International Service
- ✓ Be championed by one or more Columbus Rotarians
- ✓ Have significant involvement/participation by Columbus Rotarians
- ✓ Have partnership potential
- ✓ Have measurable outcomes
- ✓ Be initiated in a reasonable amount of time
- ✓ Be doable and practical
- ✓ Provide benefits commensurate with the time, talent, and resources that the Club invests
- ✓ Be easily identified as a Rotary Club of Columbus project