


Regional Leader's Reference Guide



Information in this guide has been updated for 2025-26. Any relevant changes will be posted as an addendum before the next update.

Click below to go to a page. 

▶ ABOUT THIS GUIDE

1. INTRODUCTION

▶ Overview	3
▶ Essential Leadership Skills	5

2. GETTING TO KNOW YOUR ROLE

▶ Regional Rotary Foundation Coordinator and Assistants	7
▶ Rotary Membership Coordinator and Assistants	12
▶ Rotary Public Image Coordinator and Assistants	16
▶ Endowment/Major Gifts Adviser	21
▶ End Polio Now Coordinator	27

3. WORKING WITH YOUR TEAMS

▶ Your Team	31
▶ Rotary Senior Leaders	31
▶ Other Regional Leaders	32
▶ Assistant Coordinators	34
▶ District Leaders	34
▶ Alumni	36

4. MEASURING SUCCESS

▶ Understanding Goals	37
▶ Developing a Plan	37
▶ Reporting Your Progress	38

5. LEARNING EVENTS

▶ Learning Events for Incoming Regional Leaders	39
▶ Regional Team Learning Event	39
▶ Regional Seminars	40
▶ Governor Seminars and Rotary Institutes	41
▶ PELS and District Events	41
▶ Virtual Opportunities	42

6. UNDERSTANDING YOUR FUNDING

▶ Budget	43
▶ Travel	43
▶ Expenses	44
▶ Assistants' Travel and Expenses	45



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

ABOUT THIS GUIDE

The Regional Leader's Reference Guide is designed to help you better understand your responsibilities as a regional leader: a regional Rotary Foundation coordinator (RRFC), Rotary membership coordinator (RMC), Rotary public image coordinator (RPIC), endowment/major gifts adviser (E/MGA), or End Polio Now coordinator (EPNC).

Whether you're an incoming regional leader or you're already serving in the role, the information in this guide can connect you with the resources you need for your work with district and club leaders.

Questions?

Contact your staff officer with any questions, comments, or suggestions you have.

- Regional Rotary Foundation coordinators:
rrfc@rotary.org
- Rotary membership coordinators:
rmc@rotary.org
- Rotary public image coordinators:
rpic@rotary.org
- Endowment/major gifts advisers:
emga@rotary.org
- End Polio Now coordinators:
endpolio.nowcoordinator@rotary.org

Regional
Leader's
Reference
Guide



1

INTRODUCTION Overview



Did you know?

My Rotary has a list of [all current regional leaders](#).

Regional
Leader's
Reference
Guide



Who regional leaders are

The term “regional leaders” refers to regional Rotary Foundation coordinators (RRFCs), Rotary membership coordinators (RMCs), Rotary public image coordinators (RPICs), endowment/major gifts advisers (E/MGAs), and End Polio Now coordinators (EPNCs).

RMCs and RPICs are appointed by the RI president and have assistant coordinators. RRFCs, E/MGAs, and EPNCs are appointed by the Rotary Foundation trustee chair. RRFCs have assistant coordinators while E/MGAs and EPNCs don't. No regional leader role is more important than any other.

What regions are

You work with a group of districts called a region. These regions are independent from Rotary's zone structure. A region might encompass an entire zone, part of a zone, or parts of multiple zones. Not all members know this, so use the term that will be clearest to your

As a regional leader, you work with district leaders to connect Rotarians and Rotaractors to resources that support Rotary's goals and deepen our impact. You also serve as learning facilitators at Rotary institutes, the governor seminars, regional and zone seminars, district learning events, and other events when asked.

audience. If you use “region,” make sure that members understand that a region does not replace or supersede a zone.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

Overview

Essential Leadership Skills

2. GETTING TO KNOW
YOUR ROLE

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

1 INTRODUCTION

Overview

Getting started with key resources

Regional Leader Insider	This newsletter has important updates and will keep you informed about new resources and regional leaders' success stories. The newsletter is emailed every other month to regional leaders, assistant coordinators, and senior leaders.
Facebook groups	RRFCs, RMCs, RPICs, and E/MGAs have role-specific Facebook groups that foster communication. Ask questions, comment on ideas, and share photos, videos, or other content with your fellow regional leaders.
Regional Leaders Library	This digital library has downloadable webinar recordings, learning materials, and other essential resources related to your role. The library is accessible to regional leaders and assistant coordinators.
Reports on My Rotary	Regional leaders and assistant coordinators have access to reports that are relevant to their role for each district in their region.
Rotary Club Central	Regional leaders and assistant coordinators can access reports, dashboards, and information on clubs' goals and achievements.

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

Overview

Essential Leadership Skills

2. GETTING TO KNOW
YOUR ROLE

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

1 INTRODUCTION

Essential Leadership Skills



Complete these courses to learn more:

[Regional Leader Basics learning plan](#)

[Rotary's Action Plan and You](#)

[Uncovering Unconscious Bias](#)

Regional Leader's Reference Guide



Leading change

Regional leaders are leaders of change, and what needs to change will vary by region and even by district. Your role is to support Rotary's work to do good in the world and help members adapt to the changes that are happening in their area. You're expected to motivate district leaders and members to implement new Rotary initiatives. You'll also need to assess the

readiness of members to make changes, make sure they understand the changes, help them plan for change, and respond to any resistance.

As you help bring about change, listen to how people respond, and adjust your messaging for your region.

Facilitation

You'll likely be asked to lead learning events and address a variety of questions about Rotary. Your role is to support participants and enable them to meet their learning objectives. You can do this by involving and respecting participants. Ask questions that will help you understand their perspective as well as helping them master the topic. You may not have answers to all of their questions, so facilitate connections with

other Rotary leaders or staff members who can support them.

You have access to many learning resources and skill-building opportunities to support you as you develop and enhance the facilitation skills that your role requires.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

Overview

Essential Leadership Skills

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

1

INTRODUCTION Essential Leadership Skills

Promoting our Action Plan

You are a champion of [Rotary's Action Plan](#), which aims to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt. The Action Plan is driving meaningful change, and your support is

important. Your role is to help district leaders understand how the Action Plan can make Rotary more effective and promote the plan to clubs.

Fostering diversity, equity, and inclusion

How we foster diversity, equity, and inclusion differs by event, club, district, and culture. Review [Rotary's Commitment to Diversity, Equity, and Inclusion](#) on My Rotary for more information, and consider how you and your team can model ways to create welcoming environments for districts and clubs in your

region. Creating diverse, equitable, and inclusive spaces takes consistent practice. You're not expected to be an expert on this topic but rather to promote inclusive behavior and a culture of belonging and respect.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

Overview

**Essential
Leadership Skills**

**2. GETTING TO KNOW
YOUR ROLE**

**3. WORKING WITH
YOUR TEAMS**

4. MEASURING SUCCESS

5. LEARNING EVENTS

**6. UNDERSTANDING
YOUR FUNDING**

Regional
Leader's
Reference
Guide



2 GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants



Many resources are available to help you succeed in your role.

For additional support, write to rffc@rotary.org.

Regional Leader's Reference Guide



Your role

Regional Rotary Foundation coordinators (RRFCs) advance The Rotary Foundation's goals and Rotary's Action Plan by increasing giving to the Annual Fund and participation in PolioPlus

efforts, as well as Foundation grants and programs. As an RRFC, you work in collaboration with district leaders to achieve these priorities.

Your responsibilities

The Rotary Foundation Code of Policies (24.020.4.) includes the following responsibilities for RRFCs.

RRFCs understand and effectively communicate about The Rotary Foundation's:

- Inclusion in Rotary's Action Plan
- Annual goals and priorities
- Fundraising opportunities for the Annual Fund and the need for funding
- Grants and programs

RRFCs lead by example by:

- Supporting fund development and grant participation in their club and the districts they serve
- Using Rotary's online tools effectively

RRFCs actively promote:

- Continuous support for achieving a polio-free world
- Opportunities in all Rotary Foundation giving tools
- Increased giving by regular donors and by members, clubs, and districts that don't give
- Clubs' participation in district grants, global grants, and Rotary Foundation programs
- Attracting qualified candidates for Rotary Peace Fellowships
- Good stewardship of Rotary Foundation funds, with full use of District Designated Funds and timely grant reporting
- Ways to strengthen alumni's connection to, engagement with, and commitment to Rotary

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Regional Rotary Foundation Coordinator and Assistants



For more information

Find resources that can enhance club and district fundraising efforts on the [Annual Fund page](#) and the [Apply for Grants page](#) of My Rotary.

Regional
Leader's
Reference
Guide



Your areas of expertise

Annual Fund

One of your primary goals is to motivate districts to increase individuals' and clubs' contributions to the Annual Fund.

How can you help district leaders focus on the Annual Fund?

- Work with district leaders to find new donors by educating members about the Foundation.
- Promote our Every Rotarian, Every Year (EREY) fundraising initiative to increase the participation of current members.
- Promote [Rotary Direct](#), the Foundation's recurring giving program.
- Encourage donors to become Sustaining Members or [Paul Harris Society](#) Members.

Use information from the reports on My Rotary and Rotary Club Central to determine which districts are performing well and which are

struggling. If you recognize that a district is failing to thrive, contact its leaders and offer your support and expertise. Work with them to develop fundraising events and learning opportunities, and devise other strategies to help the district meet its goals. If you find a district that's doing well, contact its leaders to learn more about their approach and then feature successful strategies in your communications.

If you see a district that isn't spending its District Designated Fund (DDF) surplus, contact the district Rotary Foundation committee to help it explain the district's DDF policy to clubs and make sure that they understand how DDF accumulates from year to year. If you find a district that's using all of its DDF, celebrate this success and share the district's strategies throughout your region.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary
Foundation Coordinator
and Assistants

Rotary Membership
Coordinator and Assistants

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Regional Rotary Foundation Coordinator and Assistants



For more information

Get information and materials on PolioPlus fundraising and advocacy efforts at endpolio.org and the Global Polio Eradication Initiative site.

Regional Leader's Reference Guide



Your areas of expertise

Rotary grants

You play an important role in supporting district leaders throughout the grant process: application, approval, implementation, and reporting. You should be knowledgeable about Rotary grants and be available to answer questions and offer guidance.

How can you support district leaders during the grant process?

- Offer your help with the grant application process.
- Encourage them to attend regional seminars to learn about community assessments, sustainability, criteria for areas of focus, and other grant guidelines.
- Connect district leaders to new audiences, including Rotaractors, to increase participation in global grants.
- Share stories of successful grant projects to promote participation and showcase the Foundation's impact.
- Regularly check the Grant Center and contact district leaders if a grant application has been pending for a while.

- Promote district international service chairs (DISCs) as people who can help grant sponsors find international partners.
- Encourage district leaders to consult with [The Rotary Foundation Cadre of Technical Advisers](#) and local experts in the [district resource network](#) to help clubs plan more effective projects.

PolioPlus

Our PolioPlus program is dedicated to the global eradication of polio, Rotary's highest external priority. Collaborate with your region's End Polio Now coordinator (EPNC) to raise awareness of polio, raise funds for PolioPlus, and increase the number of clubs that give to PolioPlus. Together with the EPNC, encourage districts in your region to contribute 20% or more of their DDF starting balance to PolioPlus, and encourage clubs to give at least US\$1,500 to PolioPlus annually. Work with club and district leaders to plan events for World Polio Day on 24 October every year.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Regional Rotary Foundation Coordinator and Assistants

Assistant regional Rotary Foundation coordinators

Assistant RRFs have their own unique role on your team. They help educate clubs and districts about the importance of the Foundation.

Per The Rotary Foundation Code of Policies (24.020.6.), assistant RRFs are selected by the RRF, in consultation with the region's director and trustee, on the basis of demonstrated success with grant participation and fundraising. Assistant RRFs are appointed to one-year terms

and can serve up to three terms, to maximize their effectiveness in the districts they serve, especially with regard to geographic coverage, functional expertise, and language ability. Assistants should not simultaneously serve in other time-intensive regional or district roles.

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

**Regional Rotary
Foundation Coordinator
and Assistants**

Rotary Membership
Coordinator and Assistants
Rotary Public Image
Coordinator and Assistants
Endowment/Major
Gifts Adviser
End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Regional Rotary Foundation Coordinator and Assistants



Want to learn more?

[RRFC Essentials learning plan](#)

[The Rotary Foundation course catalog](#)

Key resources and contacts

- [Donor Recognition](#)
- [Grant Center](#)
- [Learning Center](#)
- [My Rotary Reports](#)
- [Programs of Scale](#)
- [Rotary Club Central](#)
- [Service Project Center](#) (formerly Rotary Showcase)
- [The Rotary Foundation](#)
- Annual Fund: annualfund@rotary.org
- Cadre of Technical Advisers: cadre@rotary.org
- DDF: share@rotary.org
- Grants: grants@rotary.org
- PolioPlus: polioplus@rotary.org
- Programs of Scale: programsofscale@rotary.org
- RRFC staff officer: rrfc@rotary.org

Check your knowledge

1. Which district leaders do you work with and support?
2. Which knowledge or skills are the most important to your success?
3. What strategies should you use to motivate people to give to The Rotary Foundation?

Regional Leader's Reference Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Rotary Membership Coordinator and Assistants



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

**Rotary Membership
Coordinator and
Assistants**

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING



In addition to your staff officer, many resources are available to help you succeed in your role.

For support write to rmc@rotary.org.

Regional
Leader's
Reference
Guide



Your role

Rotary membership coordinators (RMCs) proactively advance Rotary's Action Plan by facilitating the support and strengthening of existing clubs and the establishment of new clubs and satellite clubs.

As an RMC, you work in collaboration with district leaders to encourage members and clubs to increase member attraction and engagement and promote participation in Rotary programs.

Your responsibilities

The Rotary Code of Policies (29.020.4.) includes the following responsibilities for RMCs.

RMCs understand and effectively communicate about Rotary's:

- Action Plan
- Annual goals and priorities
- Regionally appropriate membership attraction and engagement strategies
- Strategies for creating new clubs and satellite clubs
- Programs

RMCs lead by example by:

- Inviting at least one person to join their club each year
- Supporting effective member engagement activities in their Rotary club
- Using Rotary's online tools effectively

RMCs actively promote:

- Strong, dynamic, flexible, and effective clubs
- Strategies for attracting new members and engaging current members
- Development of new clubs and satellite clubs
- Strategic planning at the club and district levels
- Adoption and use of Rotary's online tools
- Participation in Rotary programs
- Monitoring and responding to club, district, and regional membership trends
- Club success stories
- Ways to strengthen alumni's connection to, engagement with, and commitment to Rotary

2

GETTING TO KNOW YOUR ROLE Rotary Membership Coordinator and Assistants



For more information

Find resources that can boost membership efforts on the [Membership page](#) of My Rotary.

Regional
Leader's
Reference
Guide



Your areas of expertise

Membership

Our members are our greatest asset. When our membership increases, our clubs become more vibrant, we have more accomplishments to show the world, and we have more resources we can use to help communities flourish. Membership is Rotary's highest internal priority.

How can you help district leaders focus on membership?

- Regularly use membership reports to review membership trends, and discuss them with district leaders. Offer them data-driven strategies for overcoming challenges, and share success stories about districts that have positive trends.
 - Offer ongoing support and development for district membership chairs (DMCs) through regular conference calls or consultations.
 - Provide opportunities for DMCs to connect with one another, either in person or through virtual meetings, conference calls, webinars, chats, or social media groups.
- Encourage clubs to reflect the communities they serve by being inclusive of all cultures, experiences, and identities, both in their membership and in their leadership.
 - Boost the use of online membership leads by encouraging districts and clubs to follow up on their leads and offering guidance in how to use online member leads effectively.
 - Work with districts to develop innovative clubs, including satellite clubs, that provide new experiences and appeal to underrepresented groups.
 - Encourage clubs to adopt flexible meeting formats and offer the membership types that best meet their members' needs.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

**Rotary Membership
Coordinator and
Assistants**

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Rotary Membership Coordinator and Assistants



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

**Rotary Membership
Coordinator and
Assistants**

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

Your areas of expertise

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've analyzed their current state, identified challenges, and developed ways to overcome obstacles to achieve their goals. A strategic plan also provides a club or district with continuity even as leadership changes.

Finding meaningful ways to align club and district plans with the priorities of Rotary's Action Plan creates a common purpose that supports Rotary's growth.

How can you encourage club and district leaders to develop strategic plans?

- Educate them about how Rotary's Action Plan will make Rotary stronger and even more effective in the future.
- Promote the [District Planning Guide](#) and [Strategic Planning Guide](#) as valuable resources that can help with the planning process.

- Encourage club and district leaders to create a leadership development plan and a succession plan, if they don't already have those plans.
- Show them that using Rotary Club Central to monitor data and track goals creates a historical record that future leaders can use in planning and setting goals.
- Explain that clubs can receive the Club Excellence Award (formerly known as Rotary Citation) by selecting and achieving the goals that are most relevant to them.
- Offer guidance from the regional leader team on the club's or district's strategic plan and provide other support throughout the year.



For more information

Find additional materials about strategic planning on the [Action Plan page](#) of My Rotary.

Regional
Leader's
Reference
Guide



2

GETTING TO KNOW YOUR ROLE Rotary Membership Coordinator and Assistants



Want to learn more?

[RMC Essentials learning plan](#)

Assistant Rotary membership coordinators

Assistant RMCs have their own unique role on your team. They help educate clubs and districts about the importance of Rotary's membership.

Per the Rotary Code of Policies (29.020.6.), assistant RMCs are selected by the RMC, in consultation with the region's director, on the basis of demonstrated success in regional member attraction and engagement strategies,

development of new clubs and satellite clubs, strategic planning, and Rotary programs. Assistant RMCs are appointed annually, for up to three years, to maximize their effectiveness in the districts they serve, especially with regard to geographic coverage, functional expertise, and language ability. Assistants should not simultaneously serve in other time-intensive regional or district roles.

Key resources and contacts

- [Learning Center](#)
- [Membership page](#)
- [My Rotary Reports](#)
- [Programs page](#)
- [Rotary Club Central](#)
- Diversity, equity, and inclusion: dei.inquiries@rotary.org
- Membership Development: membershipdevelopment@rotary.org
- Membership reports: membership.reports@rotary.org
- RMC staff officer: rmc@rotary.org
- Rotaract: rotaract@rotary.org

Check your knowledge

1. Which district leaders do you work with and support?
2. Which knowledge or skills are the most important to your success?
3. What strategies should you use to support membership development in your region?

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

**Rotary Membership
Coordinator and
Assistants**

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE

Rotary Public Image Coordinator and Assistants

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Your role

Rotary public image coordinators (RPICs) proactively advance Rotary's Action Plan by building the capacity of clubs and districts to tell compelling stories that depict our members as people of action. As an RPIC, you work in collaboration with district leaders to encourage

members and clubs to have a robust media and social media strategy, an up-to-date website, and an engaging online presence. You also advise on locally and regionally appropriate use of Rotary's brand and materials for public image campaigns.

Your responsibilities

The Rotary Code of Policies (29.030.4.) includes the following responsibilities for RPICs.

RPICs understand and effectively communicate about Rotary's:

- Action Plan
- Annual goals and priorities
- Regionally appropriate activities to build public image
- Need for a consistent and unified Rotary brand and message
- Visual identity and why its correct use is important

RPICs lead by example by:

- Championing Rotary's public image campaigns in their club
- Using Rotary's online tools to tell Rotary's story
- Sharing examples of club and district successes and challenges in public image building to facilitate improvement
- Having a visible and vibrant presence in traditional media and/or social media

Regional Leader's Reference Guide



2 GETTING TO KNOW YOUR ROLE

Rotary Public Image Coordinator and Assistants



In addition to your staff officer, many resources are available to help you succeed in your role.

For support, write to rpic@rotary.org.

Your responsibilities

RPICs actively promote:

- Engagement of clubs and districts in coordinated public image activities
- Adoption and use of Rotary's Brand Center and other online tools to tell Rotary's story
- Adoption and use of Rotary's brand and other visual identity assets
- Use of a consistent and unified Rotary message
- Clubs and districts telling stories about their impact in communities
- Well-maintained club and district websites
- The need for clubs and districts to have a robust social media presence
- Ways to highlight Rotarian, Rotaract, and Rotary alumni stories
- Best practices for marketing Rotary special events and activities in local communities

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

Rotary Membership
Coordinator and Assistants

**Rotary Public Image
Coordinator and
Assistants**

Endowment/Major
Gifts Adviser

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2 GETTING TO KNOW YOUR ROLE

Rotary Public Image Coordinator and Assistants



For more information

Find resources that can help districts and clubs develop public image strategies in the [Brand Center](#).

Regional Leader's Reference Guide



Your areas of expertise

The Rotary brand and public image

For greater awareness and impact, it's crucial to maintain consistent brand messaging and visual identity in Rotary. We can expand our reach and increase our impact only when prospective participants, members, and supporters recognize and understand Rotary and the value we bring to communities worldwide.

How can you help districts focus on the Rotary brand?

- Promote online tools such as the Brand Center, and encourage district leaders to use the Brand Center to create regionalized materials.
- Educate district leaders on the correct use of our visual brand.

- Promote the brand and public image courses in the Learning Center.
- Share success stories about districts and clubs that use our brand well.
- Encourage districts and clubs to appoint public image chairs.
- Offer ongoing support for district public image chairs, and help them network with one another in person or online.
- Emphasize Rotary's impact, show how our members are people of action, and publicize regional accomplishments to both internal and external audiences.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2 GETTING TO KNOW YOUR ROLE

Rotary Public Image Coordinator and Assistants



For more information

Find materials to tell your People of Action story on the [People of Action page](#) of the Brand Center.

Regional Leader's Reference Guide



Your areas of expertise

Telling People of Action stories

Stories of Rotary's impact, from local projects to global polio eradication efforts, boost public understanding of who we are and what we do. To convey these stories to those who are not familiar with our local and global initiatives, we use our People of Action messaging campaign. This campaign unifies our message, emphasizing that we are problem solvers who take action — professionals and community leaders who are dedicated to enhancing our communities.

How can you encourage club and district leaders to use People of Action messaging?

- Share strategies and resources for creating clear and compelling stories.

Assistant Rotary public image coordinators

Assistant RPICs have their own unique role on your team. They help to educate clubs and districts about the importance of telling Rotary's story.

Per the Rotary Code of Policies (29.030.6.), assistant RPICs are selected by the RPIC, in consultation with the region's director, on the basis of demonstrated success in marketing,

- Offer guidance on how to use materials from our Brand Center, including brand guidelines for People of Action; ready-to-use visual, audio, and video People of Action materials; and templates for creating customized materials.
- Lead by example and share inspiring club stories on your social media platforms.
- Offer your assistance to address distinct storytelling needs.
- Encourage clubs and districts to show our members as people of action who make a difference in their communities.

media, or public relations. Assistant RPICs are appointed annually, for up to three years, to maximize their effectiveness in the districts they serve, especially with regard to geographic coverage, functional expertise, and language ability. Assistants should not simultaneously serve in other time-sensitive regional or district roles.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE

Rotary Public Image Coordinator and Assistants



Want to Learn More?

[RPIC Essentials learning plan](#)

[Public Relations and Your Club](#)

Key resources and contacts

- [Brand Center](#)
- [Enhancing Our Public Image](#)
- [Learning Center](#)
- [My Rotary Reports](#)
- [Rotary Club Central](#)
- Brand Center: brandcenter@rotary.org
- Branding and logos: brand@rotary.org
- Graphic design: graphics@rotary.org
- Licensing and merchandise production: rilicensingservices@rotary.org
- Public relations and marketing: pr@rotary.org
- RPIC staff officer: rpic@rotary.org

Check your knowledge

1. Which district leaders do you work with and support?
2. Which knowledge or skills are the most important to your success?
3. What strategies should you use to raise awareness of Rotary in your region?

Regional Leader's Reference Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2 GETTING TO KNOW YOUR ROLE

Endowment/Major Gifts Adviser



In addition to your staff officer, many resources are available to help you succeed in your role.

For support, write to emga@rotary.org.

Regional
Leader's
Reference
Guide



Your role

Endowment/major gifts advisers (E/MGAs) assist with the identification, cultivation, solicitation, and donor stewardship of major gifts. E/MGAs focus on major gifts of US\$25,000 or more, including gifts to the Endowment.

Your responsibilities

The Rotary Foundation Code of Policies (24.030.4.) includes the following responsibilities for E/MGAs.

E/MGAs understand and effectively communicate about The Rotary Foundation's:

- Inclusion in Rotary's Action Plan
- Annual goals and priorities
- Fundraising opportunities for major gifts
- Emphasis on supporting Rotary's Endowment

E/MGAs lead by example by:

- Supporting major gift giving and donations to the Endowment
- Using Rotary's online tools effectively

As an E/MGA, you work in collaboration with district leaders and fund development staff partners to encourage members to support Rotary's Endowment and participate in opportunities to give major gifts.

E/MGAs actively promote:

- Continuous support for achieving a polio-free world
- Strategies for encouraging major gifts and commitments of US\$25,000 or more
- Ways and opportunities to give major gifts to The Rotary Foundation, including gifts to Rotary's Endowment, PolioPlus, Rotary Peace Centers, and major gifts initiatives in areas of focus
- The establishment of effective district endowment/major gifts subcommittees

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

Rotary Membership
Coordinator and Assistants

Rotary Public Image
Coordinator and Assistants

**Endowment/Major
Gifts Adviser**

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Endowment/Major Gifts Adviser

Your responsibilities

E/MGAs are responsible for:

- Developing personalized cultivation, solicitation, and stewardship plans for prospective Major Donors each year, in consultation with fund development staff partners and district leaders as appropriate
- Being involved in the solicitation of three or more major gifts annually, with an emphasis on gifts of US\$25,000 or more
- Planning or supporting the planning of cultivation activities for Foundation supporters at the Rotary institute or other Rotary events
- Planning cultivation and recognition of Foundation supporters and prospective Major Donors, in consultation with their director and/or trustee, RRFs, advisers for major gifts initiatives in areas of focus, and other district leaders as appropriate
- Helping to identify potential donors by using all available resources

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

Rotary Membership
Coordinator and Assistants

Rotary Public Image
Coordinator and Assistants

**Endowment/Major
Gifts Adviser**

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE Endowment/Major Gifts Adviser

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Your areas of expertise

The four-step process

Engaging a donor involves four steps: identification, cultivation, solicitation, and stewardship. The process is not always sequential, and sometimes you may need to go back to a previous stage, depending on the donor's needs. Being donor centered and building trust with your donor should be embedded within all four steps. You can achieve this by helping the donor decide how and where to direct their gift, in accordance with their interests and passions, to maximize its impact.

How can you use the four-step process to secure major gifts?

- Use reports on My Rotary to understand major giving patterns within districts and find data on prospective donors. You can then work with district leaders and your fund development staff partner to make a cultivation plan.

- Update your prospect list regularly, and share it with the Foundation staff.
- Talk to prospective donors about their experiences and what is meaningful to them.
- Identify the person who is best suited to ask for a major gift by assessing who has the most influence with that donor. At times, someone else, such as your director, trustee, or a district governor, might be the best choice.
- Use the Monthly Major Gifts Report to find donors to recognize through phone calls, thank-you notes, or recognition items. Consider sending personal, tailored messages to donors on your prospect list.
- Work closely with the district governor throughout the four-step process if they have a strong relationship with a potential donor.

Regional Leader's Reference Guide



2

GETTING TO KNOW YOUR ROLE Endowment/Major Gifts Adviser

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Your areas of expertise

Rotary's Endowment

Gifts to Rotary's Endowment give future members the resources they'll need to design and implement sustainable projects year after year. Support for the Endowment may come through a current gift, a planned gift in an estate, or a combination of both.

How can you help grow the Endowment?

- Educate yourself on Rotary's Endowment, how it supports Rotary programs, and why donors might want to support it.
- Use resources from the [Growing the Endowment page](#) to help you raise awareness of the Endowment, promote the Rotary's Promise Club designation, and encourage gifts or commitments to the Endowment.
- Give presentations to district leaders and share materials with them to inform them of the Foundation's goal of building the Endowment to US\$2.025 billion by 2025.
- Support district leaders in establishing and strengthening district endowment/major gifts subcommittees, and work closely with these committees to identify prospective donors and educate clubs about giving opportunities.

- Identify potential Bequest Society and Legacy Society members, and work with staff partners to welcome new members to these societies.
- Share information about [donor recognition opportunities](#), as well as naming opportunities that enable donors to personalize their legacy by honoring a friend or family member with a named or endowed gift.

Giving opportunities

The path to giving a major gift is highly personal to each donor. So being donor centered or building trust with your donor is integral to fundraising for major gifts. This type of fundraising involves learning about prospective donors' giving priorities and strengthening their interest and involvement in Rotary. In addition to outright major gifts and pledges, you also work with donors on their commitments (or bequests) to provide funds to the Foundation from their estate, through a will, insurance, or a retirement plan.

Cultural practices vary; in some regions, these differences may warrant a greater focus on outright gifts than on bequests, or vice versa.



For more information

Details about the Endowment, structuring a legacy, and recognition opportunities are available on the [Rotary's Endowment page](#).

Regional Leader's Reference Guide



2

GETTING TO KNOW YOUR ROLE Endowment/Major Gifts Adviser

Support for your work

Though E/MGAs don't have assistants, you have other sources of support. You can draw on the expertise of your fund development staff partner, your E/MGA staff officer, and district leaders, including district Endowment subcommittee chairs.

Major gifts officers are the primary staff members for identifying, cultivating, and soliciting major gifts and commitments. Their responsibilities include partnering with you to develop prospect lists, strategize on individual

or event-based cultivation, and support district seminars. Your staff partner may be available to accompany you on solicitation trips or help you identify opportunities to cultivate new prospects for major gifts and build relationships with existing donors.

You can also work with the advisers for major gifts initiatives in areas of focus on events and outreach to target specific areas of focus or Rotary Peace Centers contributions.

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

Rotary Membership
Coordinator and Assistants

Rotary Public Image
Coordinator and Assistants

**Endowment/Major
Gifts Adviser**

End Polio Now
Coordinator

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2 GETTING TO KNOW YOUR ROLE

Endowment/Major Gifts Adviser



Want to learn more?

[E/MGA Essentials learning plan](#)

Key resources and contacts

- [District Guide to Growing The Rotary Foundation Endowment](#)
- [Donor Recognition page](#)
- [Learning Center](#)
- [My Rotary Reports](#)
- [Rotary Club Central](#)
- [Rotary's Endowment page](#)
- E/MGA staff officer: emga@rotary.org
- Donor Events: donor.events@rotary.org
- Donor Relations: donor.relations@rotary.org
- Planned Giving: planned.giving@rotary.org

Check your knowledge

1. Which district leaders do you work with to find prospective donors?
2. Which knowledge or skills are the most important to your success?
3. What strategies should you use to raise awareness of Rotary's Endowment in your region?

Regional Leader's Reference Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2 GETTING TO KNOW YOUR ROLE

End Polio Now Coordinator



In addition to your staff officer, many resources are available to help you succeed in your role.

For support, write to endpolio.nowcoordinator@rotary.org.

Regional Leader's Reference Guide



Your role

End Polio Now coordinators (EPNCs) foster awareness of polio, advocate for its eradication, and raise funds for this pressing cause at the club and district levels. As an EPNC, you work in collaboration with district leaders to help

Rotary raise at least US\$50 million each year in contributions, District Designated Funds (DDF), and World Fund matches to achieve our annual End Polio Now fundraising goal.

Your responsibilities

The Rotary Foundation Code of Policies (24.040.4.) includes the following responsibilities for EPNCs.

EPNCs understand and effectively communicate about The Rotary Foundation's:

- Inclusion in Rotary's Action Plan
- Annual goals and priorities
- Fundraising, advocacy, and awareness-raising opportunities
- Emphasis on supporting PolioPlus and the End Polio Now fundraising campaign

EPNCs lead by example by:

- Supporting the promotion of polio eradication and participation in End Polio Now fundraising
- Using Rotary's online tools effectively

EPNCs actively promote:

- Continuous support for achieving a polio-free world
- Strategies for encouraging outright major gifts of US\$10,000 or more to PolioPlus
- Ways and opportunities to give major gifts to PolioPlus
- The establishment of effective district PolioPlus subcommittees
- Identifying medical professionals in the region and involving them in zone and district activities, if regionally appropriate

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE End Polio Now Coordinator

Your responsibilities

EPNCs are responsible for:

- Staying informed about the status of polio eradication and serving as a resource on polio
- Supporting the promotion of polio eradication efforts
- Assisting district leadership teams in setting End Polio Now fundraising goals
- Encouraging districts to allocate 20% or more of their DDF to PolioPlus
- Encouraging district leadership teams to advocate for government support, remind their communities that polio still exists, and set ambitious fundraising goals
- Monitoring the fundraising progress of their assigned districts monthly and giving them status reports
- Promoting polio eradication through presentations at Rotary meetings
- Offering information, resources, and support to the regional leadership team
- Providing strategies for meeting and exceeding End Polio Now goals and encouraging district leaders to follow through
- Where PolioPlus national advocacy advisers and national PolioPlus chairs exist, working with them on advocacy strategies

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

Rotary Membership
Coordinator and Assistants

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

**End Polio Now
Coordinator**

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

2

GETTING TO KNOW YOUR ROLE End Polio Now Coordinator



For more information

Find information and resources for PolioPlus fundraising and advocacy efforts on endpolio.org and the [Global Polio Eradication Initiative site](#).

Regional Leader's Reference Guide



Your areas of expertise

PolioPlus

The PolioPlus program is dedicated to the global eradication of polio, Rotary's highest external priority. Collaborate with the regional Rotary Foundation coordinator (RRFC) in your region to raise awareness of polio, raise funds for PolioPlus, and increase the number of clubs that give to PolioPlus. Your role is to encourage districts to contribute 20% or more of their DDF starting balance and suggest that each club donate at least US\$1,500 to PolioPlus annually.

Work with your regional team to encourage clubs and districts to plan events for World Polio Day on 24 October each year, and ask them to register these events at endpolio.org. Also, develop strategies to promote club and district participation in World Immunization Week, 24-30 April.

How can you support PolioPlus?

- Work with district leaders to raise a minimum of US\$50 million in contributions, DDF, and World Fund matches each year.
- Advocate for government support for polio eradication through appropriate advocacy strategies.
- Give presentations to club and district leaders to build awareness of our polio eradication work and fundraising for PolioPlus in your region.
- Provide tools to help clubs and districts effectively advocate, fundraise, and educate people about the need to end polio now.
- Promote Rotary's work with our partners as well as immunization efforts in polio-affected countries.
- Lead by example and show your commitment by posting about Rotary's role in polio eradication on social media.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation Coordinator and Assistants

Rotary Membership Coordinator and Assistants

Rotary Public Image Coordinator and Assistants

Endowment/Major Gifts Adviser

End Polio Now Coordinator

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

2 GETTING TO KNOW YOUR ROLE

End Polio Now Coordinator



Want to learn more?

[EPNC Essentials learning plan](#)

Key resources and contacts

- [Donor Recognition page](#)
- [endpolio.org](#)
- [Learning Center](#)
- [My Rotary Reports](#)
- [Raise for Rotary](#)
- [Rotary Club Central](#)
- DDF: share@rotary.org
- EPNC staff officer: endpolio.nowcoordinator@rotary.org
- PolioPlus: polioplus@rotary.org

Check your knowledge

1. Which district leaders do you work with and support?
2. Which knowledge or skills are the most important to your success?
3. What strategies should you use to raise awareness of PolioPlus in your region?

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

Regional Rotary Foundation
Coordinator and Assistants

Rotary Membership
Coordinator and Assistants

Rotary Public Image
Coordinator and Assistants

Endowment/Major
Gifts Adviser

**End Polio Now
Coordinator**

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

3 WORKING WITH YOUR TEAMS

Your team

Your team is made up of your fellow regional leaders, regional leader assistants, your Rotary International director, and your Rotary Foundation trustee. You also work closely with

district leaders. So it's important to plan together and communicate regularly to maximize everyone's knowledge, skills, and resources.

Rotary senior leaders

RI directors lead the regional leader teams with support from the Foundation trustees. The most successful regional leaders regularly communicate, plan, and closely collaborate with their RI director and assigned trustee. They can help you strategize during goal setting, overcome obstacles, widen your networks, and provide important information and context about new organizational initiatives and policies.

Directors

You're expected to work in close collaboration with your zone's RI director. The director communicates a vision for the region and works with all regional leaders to achieve successful outcomes. They're directly responsible for

leading regular team meetings, facilitating teamwork, mentoring, advising on assistant selection, and promoting you to other Rotary leaders.

Trustees

You're expected to seek support from and work closely with your assigned trustee. The trustee communicates important Foundation decisions, initiatives, and helps you achieve successful outcomes. Their direct responsibilities include sharing their Foundation expertise, attending team meetings, encouraging teamwork, mentoring, and promoting you to other Rotary leaders.

3 WORKING WITH YOUR TEAMS

Click below to go to a page.



CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

Your Team
Rotary Senior Leaders

Other Regional Leaders

Assistant Coordinators
District Leaders
Alumni

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING



Remember!

Incoming regional leaders should meet with their predecessors before their term to learn about their region's opportunities and challenges.

Outgoing regional leaders should share their knowledge with their successors to help them continue current efforts successfully.

Regional Leader's Reference Guide



Other regional leaders

You work with other regional leaders to support the priorities of Rotary's Action Plan and promote Rotary's core values.

Your regional team is strongly encouraged to work together to:

- Develop shared goals and visions for your districts and region.
- Hold learning events whenever possible in your region.
- Streamline communication with district leaders to facilitate stronger collaboration.

Succession planning

It's important that you collaborate with your predecessor and successor to share knowledge and to foster continuity and consistency in your region.

Consider these best practices to help you with succession planning:

Regional context

- Share anything that helped you better understand the unique challenges and opportunities in your region.

- Explain any cultural or language differences within your region that would be helpful for your successor to know about.
- Share any strategies you discovered or developed that successfully addressed challenges in your region.

Regional and district relationships

- Introduce your successor to district leaders in the region.
- Begin including your successor in communications, learning events, and webinars during your final year.
- Offer guidance on established relationships with your RI director, the Foundation trustee supporting your region, and other regional leaders.
- RRFs, RMCs, or RPICs: Offer to advise your successor on selecting assistant coordinators.
- E/MGAs: Discuss who will maintain relationships with donors who are already in the four-step process.
- EPNCs: Discuss PolioPlus fundraising strategies for the region and which districts support PolioPlus with DDF.

3 WORKING WITH YOUR TEAMS

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

Your Team
Rotary Senior Leaders

Other Regional Leaders

Assistant Coordinators
District Leaders
Alumni

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Other regional leaders

Staff support

- Talk to your successor about how you work with Rotary staff members at our world headquarters and international offices.

Projects

- Describe any successful initiatives, projects, or events you've started in your region and encourage your successor to continue them. Be sure to tell them about key contacts, participating clubs or districts, and partner organizations.

Resources

- Give your successor any templates, guides, presentations, or other learning materials you developed.
- Create or update an online file-sharing site or some other regionally appropriate storage for your regional team's documents.
- Explain how you use Rotary reports and resources such as Service Project Center (formerly Rotary Showcase), the Learning Center, and the Brand Center.
- Reserve adequate funds for your successor's regional team learning event.

Goals and targets

- Share your goals strategy form. Advise your successor on setting targets and developing plans, and encourage collaboration with other regional leaders.

Scope of the role

- Discuss the administrative element of the role and any challenges about leading a team, managing funds, or planning annual communications and learning events.

Recommending a successor

- In your second year, you'll be invited to submit recommendations for new regional leaders.
- Consult with district and zone leaders to identify qualified candidates.
- Consider telling candidates they are being recommended but that it doesn't guarantee that they will be invited to serve.

Regional
Leader's
Reference
Guide



3 WORKING WITH YOUR TEAMS

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

Your Team
Rotary Senior Leaders
Other Regional Leaders

Assistant Coordinators

District Leaders

Alumni

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Assistant coordinators

RRFCs, RMCs, and RPICs have assistant coordinators to help them support districts in their regions. Because of the unique aspects of their role, E/MGAs work directly with their staff partner, fellow regional leaders, and district leaders. EPNCs work directly with district leaders and their fellow regional leaders.

You have the following responsibilities related to your assistants:

- Clearly explain the policy and processes for using funding.
- Provide comprehensive orientation for your assistants, including ensuring that they complete the relevant regional leader courses on Rotary's Learning Center.
- Facilitate introductions and ongoing collaboration between your assistants and district leaders.
- Share updates and information from Rotary with your assistants.
- Provide this guide and other relevant resources to your assistants.

District leaders

You and your regional team will work in collaboration with district governors and other district leaders to connect members with resources that support Rotary's goals, priorities, and Action Plan. You serve as motivators and consultants year-round and as facilitators at learning events.

To succeed, market yourself as an expert on The Rotary Foundation, member engagement, public image, major gifts, or polio eradication. Ask what district leaders hope to accomplish during the year and show them how you can

help them achieve their goals. Be specific about your expertise and the assistance you can offer. Share best practices, detailed action steps, and clear objectives.

You may not have all the answers, but you can assure district leaders that you know where to get them, whether it's from a fellow regional leader, your assistants, My Rotary, or Rotary staff members.

Regional
Leader's
Reference
Guide



3 WORKING WITH YOUR TEAMS

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

Your Team
Rotary Senior Leaders
Other Regional Leaders
Assistant Coordinators

District Leaders

Alumni

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

District leaders

District governors

You'll work with district governors, governors-elect, and governors-nominee to fulfill your responsibilities. Although you may focus your efforts on working with district committee chairs, developing a good working relationship with current and incoming governors is critical to your success.

Consider these suggestions when you work with current and incoming governors:

- Ask them what type of support would be the most valuable, such as sharing best practices, offering to explain data and reports, or strategizing with them on how to overcome challenges.
- Find out how they want to communicate with you. For example, some governors may prefer to communicate through social media, text messages, video chats, or phone calls rather than email.
- Attend events such as governors-nominee learning seminar (GNLS) and governors-elect learning seminar (GELS), where you can connect with current and incoming district governors and other leaders from your region.

- Offer to work with governors to facilitate learning opportunities for district committee chairs, and make sure that you have a shared understanding of how you as a regional leader will work with those chairs directly.

District committee chairs

District committee chairs are appointed by district governors to oversee a specific districtwide program, priority, or initiative. You will likely work most closely with the committee chairs who are in charge of your areas of expertise. Because of this, it's important to build relationships with them and to agree with district governors on how your team will work with their committees.

Before you contact a committee chair, talk with the governor to learn how they prefer you to work with committee chairs and how much they want to be involved. To get a list of district officers in your region, run the Status of Assistant Governors and District Officers in the District report in My Rotary.

Regional
Leader's
Reference
Guide



3 WORKING WITH YOUR TEAMS

Click below to go to a page.



CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

Your Team
Rotary Senior Leaders
Other Regional Leaders
Assistant Coordinators

District Leaders

Alumni

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING



Find information and resources on the [Alumni page](#) on My Rotary.

District leaders

Here are some of the district leaders you might work with:

RRFC

- District Rotary Foundation chair
- District grants subcommittee chair
- District international service chair
- District learning facilitator

RMC

- District membership chair
- District Rotaract chair
- District Rotaract representative
- District learning facilitator

RPIC

- District public image chair
- District learning facilitator

E/MGA

- District Rotary Foundation chair
- District endowment/major gifts subcommittee chair

EPNC

- District Rotary Foundation chair
- District PolioPlus subcommittee chair

Alumni

Alumni are a valuable part of the family of Rotary.

You can help keep alumni involved in Rotary by:

- Encouraging district leaders to use the Program Participants and Alumni Report on My Rotary to connect clubs with their alumni and help maintain the alumni's ties with Rotary

- Collaborating with district leaders to promote club participation in Reconnect Week each October to renew alumni connections with Rotary
- Recognizing districts that involve alumni in service projects and global grants
- Working with your district alumni chair to develop an outreach plan to build strong relationships with current program participants as well as alumni

Regional Leader's Reference Guide



4 MEASURING SUCCESS



Reporting timeline

Goals Strategy Form
(for the year ahead):
May-June

Progress Report:
November

Conversation with
senior leader: January

Year-End Report: June

*The exact dates will vary
each year. Contact your
staff officer for more
information.*

Regional
Leader's
Reference
Guide



Understanding goals

Regional leader goals are developed annually by the president-elect and trustee chair-elect to align with Rotary's goals, Action Plan, senior leader multiyear goals, and Club Excellence Award (formerly known as Rotary Citation).

Developing a plan

To reach your goals, create a plan with measurable targets and monitor your progress toward them throughout the year. Customize your targets so that they're realistic for your region. Both your plan and the targets you establish are most effective when they are specific, measurable, achievable, and time bound.

As you create your plan, consult with your director and trustee to identify regional challenges and build on past successes. Talk to district leaders and work with your regional team to create a joint plan that best supports your region's needs.

These goals help quantify your impact, assess our progress on a global scale, and support your region in meeting Rotary's organizational goals.

Use information from reports on My Rotary or Rotary Club Central to understand your region's status at various points during the past year, and use these benchmarks to outline your plan.

After you've thought about these factors, outline the steps needed to achieve your goals. Keep potential obstacles in mind and plan to manage them. Consider assigning tasks to members of your team. Throughout the year, monitor your progress and your team's progress as you work toward achieving your goals, and make modifications if necessary.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

Understanding Goals

Developing a Plan

Reporting Your Progress

5. LEARNING EVENTS

6. UNDERSTANDING
YOUR FUNDING

4 MEASURING SUCCESS

Reporting your progress

Per the Rotary Code of Policies (29.010.5.) and The Rotary Foundation Code of Policies (24.010.5.), regional leaders regularly report on their progress toward their goals in terms of reaching outcomes, conducting activities, improving their competencies, and making qualitative contributions.

This is an opportunity to assess your own performance and your team's, share significant successes and challenges, and indicate any additional support or resources you need. When it's time to submit a report, you'll receive a link by email. Your director or trustee may review your reports upon request.

Consider these tips for completing reports:

- Keep track of events, presentations, consultations, and seminars that you or your assistants lead or participate in.
- Work with your team to gather the information for the report.
- Be specific about your successes and challenges.
- Explain how you addressed challenges, what the results were, and how your team has been following up.

5 LEARNING EVENTS



Tips for a successful regional team learning event

Prepare the curriculum.

Include self-guided activities.

Stay connected.

Regional Leader's Reference Guide



Learning events for incoming regional leaders

Incoming regional leaders prepare for their roles by participating in learning events before their terms begin. These events may be held in person or virtually. This is an opportunity to learn more about the role, exchange ideas, meet other leaders, and socialize.

Per the Rotary Code of Policies (29.010.2.) and The Rotary Foundation Code of Policies (24.010.2.), incoming regional leaders attend

Regional team learning event

Your regional team learning event is an opportunity to meet as a team, plan for the year, and prepare assistants before 1 July. This event is convened by the RI director who will oversee the regional team in the coming Rotary year. It may include your full regional team — the RRFC, RMC, RPIC, E/MGA, EPNC, and assistant coordinators — and the regional team from your paired zone. Discuss your plans with your region's trustee, and invite them to participate and share their expertise with your team.

learning events to orient them to their roles and build the skills that their role requires. Learning events are planned by a moderator and by lead facilitators for each regional leader group in consultation with staff members. The moderator and lead facilitators are selected by the RI president-nominee and the incoming trustee chair-elect.

Outgoing regional leaders should coordinate with their successors and set aside enough funds for a regional team learning event. If an in-person meeting is too costly, host an online meeting or series of conference calls.

Give this guide to all participants, including assistants, and encourage them to review the relevant sections before the event. You can also supplement the learning event with the topics and ideas that will best serve your region and districts. Download the [Regional Event Planning Guide](#) to see a sample agenda and curriculum.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

Learning Events for Incoming Regional Leaders

Regional Team Learning Event

Regional Seminars

Governor Seminars and Rotary Institutes

PELS and District Events

Virtual Opportunities

6. UNDERSTANDING YOUR FUNDING

5 LEARNING EVENTS

Regional seminars

You may choose to host a regional seminar in collaboration with your regional leader team. This joint district or multidistrict seminar allows regional leaders to address district leaders as a team and promote broader initiatives. The seminar is open to all district leaders and interested Rotary members (district governors, governors-elect, and chairs of related district committees, depending on the topic).

You can use your regional leader funding to cover expenses associated with the seminar and to provide support materials.

Consider these best practices:

- Hold the seminar as a one-day learning event in conjunction with the governors-nominee learning seminar (GNLS), governors-elect learning seminar (GELS), a Rotary institute, or other big regional events. If the content duplicates GNLS or GELS curriculum, don't invite governors-nominee or governors-elect to the seminar.
- Conduct a needs assessment so you can tailor the content to the needs of the attendees.
- Organize seminars by region, country, or groups of countries so that participants don't have to travel as far.
- Use technology to host your seminar to make it more accessible.
- Consider charging a separate registration fee for the seminar to help cover costs.

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

Learning Events for Incoming
Regional Leaders

Regional Team Learning Event

Regional Seminars

Governor Seminars and Rotary
Institutes

PELS and District Events

Virtual Opportunities

6. UNDERSTANDING
YOUR FUNDING

5 LEARNING EVENTS



Questions about your role at district events or your institute?

Work with the institute convener and GNLS and GELS team leaders to clarify your role and responsibilities.

Regional Leader's Reference Guide



Governor seminars and Rotary institutes

Per the Rotary Code of Policies (19.040.7.) and The Rotary Foundation Code of Policies (24.010.3.), governors-elect learning seminar facilitators include RMCs, RPICs, and RRFs from the zone or zones. However, all regional leaders are encouraged to attend the governors-elect learning seminar (GELS), governors-nominee learning seminar (GNLS), and Rotary institute in their regions.

PELS and district events

Attending presidents-elect learning seminars (PELS) and other district events, including the [workshop on vibrant clubs](#), is a great way to meet club leaders. Make sure to consult and collaborate with district governors-elect before you offer your support to clubs. You won't be able to attend every district event, and your assistants may be best positioned to support some events, so coordinate with them and the rest of the regional team to decide who will

Serving as a presenter, learning facilitator, or adviser at these events is important to your role of supporting clubs and districts in your region. It's also an excellent opportunity to introduce yourself, demonstrate the value you bring to districts, and build relationships with future district leaders. Keep in mind that your regional leader funding may be used for your and your team's participation at these events, regardless of whether you're a member of the official team.

attend which events. Consider how else you can support the ones you don't attend.

If budget constraints prevent you or your team from attending an event you were invited to, consider asking the district to cover a portion of your costs.

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

Learning Events for Incoming Regional Leaders

Regional Team Learning Event
Regional Seminars

Governor Seminars and Rotary Institutes

PELS and District Events

Virtual Opportunities

6. UNDERSTANDING YOUR FUNDING

5 LEARNING EVENTS



Did you know?

You can take the [Conducting Online Learning Events course](#) in the Learning Center to get tips on changing in-person events to virtual ones.

Virtual opportunities

Most likely, you won't be able to visit every district or regularly meet in person with your team. You can continue to engage with regional, district, and club leaders online. Offering learning events online can bridge physical distances, accommodate busy schedules, and create more inclusive and accessible learning environments.

Also consider recommending Learning Center courses that are related to your areas of expertise to participants before or after a learning event or in place of in-person learning events. Many regional leader teams find that virtual events are an effective way for them to work together and exchange tips, experiences, and best practices, too.

Regional
Leader's
Reference
Guide



Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW
YOUR ROLE

3. WORKING WITH
YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

Learning Events for Incoming
Regional Leaders
Regional Team Learning Event
Regional Seminars
Governor Seminars and Rotary
Institutes
PELS and District Events

Virtual Opportunities

6. UNDERSTANDING
YOUR FUNDING

6 UNDERSTANDING YOUR FUNDING

Click below to go to a page.



CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Budget

Travel

Expenses

Assistants' Travel and Expenses



Remember!

It's important to plan your spending for the whole year.

Budget

Each regional leader can use supplemental funds for reimbursement of eligible expenses specific to their role throughout the Rotary year. The amount of your funding is determined by a formula that considers the geographical area of your region and the number of districts in it, among other factors. You're informed of the exact amount of your funding in early July, after the RI Board of Directors and The Rotary Foundation Board of Trustees approve it.

You're responsible for adhering to Rotary's [travel and expense policy](#) and being a good steward of the organization's resources while on Rotary assignments. Your regional leader funding is distinct from any other Rotary funding you may receive, such as funding for donor recognition or for travel as a president's representative.

Travel

Select the most economical form of transportation when you travel for meetings, events, or other activities related to your role.

Here's what you need to know about arranging travel for your next Rotary assignment:

- Review the [Travel page](#) on My Rotary to make sure that you're following the correct process and to submit your travel request.
- Arrange all travel through Rotary Travel Service's authorized agencies. Local purchase of airfare is discouraged.

- Check whether hotel arrangements need to be booked or preapproved by Rotary-designated agencies or are arranged by the conveners.

Travel insurance is provided to all regional leaders and assistants for Rotary-funded travel. For more information, contact Rotary's Risk Management staff at insurance@rotary.org.

Regional Leader's Reference Guide



6 UNDERSTANDING YOUR FUNDING

Click below to go to a page.



CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Budget

Travel

Expenses

Assistants' Travel and Expenses

Expenses

Reimbursement

Rotary will reimburse legitimate and reasonable business expenses incurred while conducting authorized Rotary assignments. To be eligible for reimbursement, follow Rotary's [travel and expense policy](#). You and your assistants, if you have any, will be reimbursed for eligible expenses from the available funds in your budget.

Expense eligibility

Your funding covers eligible expenses related to participation in meetings, events, or activities that directly support clubs and districts in your region. Refer to the resources on the [Expenses page](#) for details. If you're not sure whether your funding will cover an expenditure, contact your staff officer before you incur the expense.

Common eligible expenses include:

- Transportation expenses such as mileage, RITS-approved airfare, or train tickets
- Registration fees for events
- Office supplies
- Meals
- Software, accounts, or licenses for online meeting platforms

Common ineligible expenses include:

- Expenses incurred by a partner or spouse
- Personal gifts
- Local purchase of airfare



Unsure where to start?

Visit the [Travel & Expenses page](#) of My Rotary for expense report forms, exchange rates, and other useful travel information.

Regional Leader's Reference Guide



6 UNDERSTANDING YOUR FUNDING

Click below to go to a page.

CONTENTS

ABOUT THIS GUIDE

1. INTRODUCTION

2. GETTING TO KNOW YOUR ROLE

3. WORKING WITH YOUR TEAMS

4. MEASURING SUCCESS

5. LEARNING EVENTS

6. UNDERSTANDING YOUR FUNDING

Budget

Travel

Expenses

Assistants' Travel and Expenses

Expenses

Tracking expenses

You're responsible for tracking how much of your funding you and your assistants, if you have them, use. A tracking template is available on request. To verify your balance, contact your staff officer.

Submitting expenses

You'll submit your expenses online, using Rotary's expense report tool. Reports are due within 60 days after the last date of travel or when expenses were incurred, within the same Rotary year. Expenses submitted after 60 days aren't eligible for reimbursement. Indicate your regional leader role and the assignment on your report, and use a separate expense report for each assignment or trip.

Assistants' travel and expenses

If you're an RRFC, RMC, or RPIC, your funding includes funds for your assistants. You're responsible for making certain your assistants are aware of and follow the guidelines outlined above. You should notify them of due dates, tell them about any funding limitations, and track their use of funds. Assistants should discuss their travel and expenses with you in advance because regional leaders cannot review or approve their assistants' expense reports after they're submitted to Rotary.

Funding is limited and may not cover all of your and your assistants' expenses. This means that you may not be able to attend every event every year. If there is no money left in your funding, you'll need to inform your assistants and develop a plan for how to respond to pending requests from the region.