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# REGIONAL LEADER'S MANUAL

FIFTH EDITION



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This manual is designed to help you better understand your responsibilities as a regional leader or assistant coordinator. Refer to this manual throughout your term.

## Questions?

Contact your staff specialist with questions, comments, and suggestions.

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

## REGIONAL ROTARY FOUNDATION COORDINATOR

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The purpose of RRFCs is to proactively promote The Rotary Foundation's goals and Rotary's strategic plan by facilitating increased giving to and participation in The Rotary Foundation's Annual Fund and greater participation in The Rotary Foundation's district grants, global grants, and programs. RRFCs work in collaboration with the district to support and encourage Rotarians and clubs to fully participate in The Rotary Foundation's fundraising, programs, and grant opportunities.

### **Responsibilities**

Per The Rotary Foundation Code of Policies (5.020.4.):

RRFCs understand and effectively communicate The Rotary Foundation's:

- Inclusion in Rotary's strategic plan
- Annual goals and priorities
- Fundraising opportunities for the Annual Fund and the need for funding
- Grants and programs
- Alumni importance

RRFCs lead by example locally and regionally by:

- Supporting fund development and grant participation in their Rotary club and the districts they serve
- Effective use of Rotary's online tools

RRFCs actively promote locally and regionally:

- Continuous support of a polio-free world
- Opportunities in all Rotary Foundation giving tools
- Increased giving by regular donors and non-giving Rotarians, clubs, and districts
- Clubs' participation in district and global grants and Rotary Foundation programs
- Attracting qualified candidates to Rotary's Peace Centers
- Good stewardship of Rotary Foundation funding with full use of District Designated Funds and timely grant reporting
- Ways to strengthen alumni connection, engagement, and commitment to Rotary

RRFCs are also responsible for annually receiving nominations for the Rotary Alumni Global Service Award and the Alumni Association of the Year Award from Rotarians in their region. In

consultation with both the Rotary public image coordinator and the Rotary coordinator, the RRFC also selects regional winners for these awards and submits their finalist names to RI by mid-October so these regional winners may become eligible for selection at the global award level.

### Training

RRFCs, working with their assistants and in collaboration with their regional leader team, plan and conduct the following training:

- Regional team training for their assistants
- Governors-elect training seminars as invited to present. Those not invited to serve on the GETS training team are strongly encouraged to attend GETS to deepen communication and collaboration with governors-elect and district leadership.
- Regional and other district seminars as needed, which may include a regional Rotary Foundation seminar

As RRFC, you may hold a regional Rotary Foundation seminar for current and incoming district leaders and Foundation committee members. The purpose of the seminar is to give participants the information and tools they need to promote the programs of The Rotary Foundation and encourage clubs to support it financially.

Your seminar could showcase a unique fundraising effort and successful Foundation-funded project to show what's possible through The Rotary Foundation. You could also address common hurdles that district leaders face and present methods for cultivating and retaining donors, as well as developing sustainable projects that raise Rotary's profile in the community.

### Teamwork

You are a partner and peer with the E/MGA on their regional leader team. While E/MGAs focus on gifts of \$25,000 or more, both of you work together as a team to ensure successful collaboration on Foundation giving, Foundation programs, donor communication, promotion of The Rotary Foundation, planning for donor recognition activities, and to avoid duplication in gift solicitation. Additionally, you may work with End Polio Now coordinators (EPNCs) on fundraising, education, and promotion of a polio-free world.

## **Your Areas of Expertise**

### **Annual Fund**

One of your primary goals is to motivate districts to increase individual and club contributions to the Annual Fund. To accomplish this goal, you can:

- Work with districts to acquire new donors. Ideas for doing this include educating new members about The Rotary Foundation and identifying participation gaps.
- Promote Rotary Direct.
- Encourage donors to join the Paul Harris Society. Strong participation in the Paul Harris Society can ensure long-term growth in annual per capita contributions and secure more funds for a district year after year.

The Reports section on My Rotary and the RRFC Goals and Contribution Report in Rotary Club Central shows participation and contribution levels for each district in your region. Use this

information to identify which districts are performing well and which are struggling. If you see a district that's struggling, contact its leaders and offer your support and expertise. Work with them to develop fundraising events, training, and other strategies to help the district meet its goals. If you see a district that's doing well, contact its leaders to learn more about their activities so you can share successful strategies in your communications.

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

### **Rotary grants**

You play a critical role in supporting district leaders during the grant application, approval, implementation, and reporting process. As part of your role, you should be knowledgeable about both district grants and global grants and be available to answer questions and offer training. To learn more about grants, review the [global](#) and [district](#) grants pages on My Rotary.

Support district leaders during the grants process by:

- Offering them help with the grant application process
- Encouraging district leaders to attend regional seminars to learn about community assessments, sustainability, areas of focus criteria, and other grant guidelines
- Sharing stories of successful grant projects to promote participation and showcase the Foundation's impact
- Regularly reviewing the Grant Center and contacting district leaders if a global grant has been pending for a while
- Supporting the efforts of [district international service chairs](#) to identify and form a network of local Rotarians with expertise in Rotary's areas of focus, grants, and project planning. These Rotarians can advise clubs on improving the quality, impact, and sustainability of global grant projects.

### **PolioPlus**

Our PolioPlus program is dedicated to the global eradication of polio, Rotary's highest priority. Work with your End Polio Now coordinator (EPNC) to raise awareness for polio eradication and fundraise for PolioPlus. Together, encourage districts in your region to contribute 20 percent or more of their District Designated Fund starting balance, and encourage clubs to give a minimum of \$1,500, to PolioPlus. Work with your regional team to encourage clubs and districts to plan an event for World Polio Day, 24 October. Register all World Polio Day events at [endpolio.org](#).

Find information and resources for club and district PolioPlus fundraising and advocacy efforts can be found on [End Polio Now](#) and the [Global Polio Eradication Initiative](#).

### **Alumni**

[Alumni](#) are a valuable part of the family of Rotary. You can help keep them involved in Rotary by encouraging district leaders to:

- Use the information in the [Program Participants and Alumni Report](#) to connect clubs with their alumni and maintain their relationship with Rotary
- Promote club participation in [Reconnect Week](#) each October to focus attention on renewing alumni connections with Rotary
- Recognize districts that involve alumni in service projects and global grants

- Feature alumni that have contributed their time and talent to the Foundation in your communications to district leaders

You are responsible for selecting regional winners for the Rotary Alumni Global Service Award and the Alumni Association of the Year Award. Online nomination forms are open to all Rotarians and alumni from 1 July to 15 September. After you receive nominations from your region, work with the RC and RPIC to select and submit a winner for each award to RI by 15 October. The winners for your region can be recognized at district or zone events.

Find resources to help you with your alumni duties on the [Alumni](#) page on My Rotary.

### **Rotary Peace Fellowships**

Rotary Peace Centers is the flagship program of our peace and conflict prevention/resolution area of focus and our premier international educational opportunity.

Assist districts that have questions or concerns about the Rotary Peace Centers program. Find resources for clubs and districts on the [Rotary Peace Fellowships](#) page on My Rotary.

Support districts with questions about peace fellowships by:

- Sharing the peace fellowship application and district endorsement process
- Providing resources such as the Rotary Peace Center Program Guide for Rotarians, endorsement instructions, and program presentation
- Connecting clubs and districts with program alumni for speaking engagements and subject matter expertise on Rotary projects and grants
- Connecting clubs and districts with [Rotary Peace Centers staff](#)

### **Endowment**

Gifts to The Rotary Foundation Endowment ensure that future Rotarians will have the resources they need to design and implement sustainable projects year after year.

The Foundation has a goal of building the Endowment to \$2.025 billion by the year 2025. You can support the efforts of E/MGAs and the Fund Development staff to reach this goal by helping to identify potential Major Donors and Bequest Society members. Here are some other ways you can raise awareness:

- Encourage club and district leaders to show [The Rotary Foundation Endowment promotional video](#) and the [Endowment awareness and gift discussion presentations](#) (Your Legacy, Rotary's Promise PowerPoints) at events.
- Order [Your Rotary Legacy notification cards](#) to share (available for free on [shop.rotary.org](#)).
- Encourage donors to join the Bequest Society online.

Contact [legacy@rotary.org](mailto:legacy@rotary.org) with questions.

Visit [rotary.org/legacy](http://rotary.org/legacy) to learn about the Endowment, read testimonials from donors, and download resources and promotional materials from the Club & District Legacy Toolkit.

## ROTARY COORDINATOR

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The purpose of RCs is to proactively promote Rotary's strategic plan by facilitating the support and strengthening of existing clubs and the establishment of new clubs and satellite clubs. RCs work in collaboration with district leaders to support and encourage Rotarians and clubs to increase member attraction and engagement, develop new clubs and satellite clubs, and promote participation in Rotary programs. RCs also inspire, motivate, train, advise, strategize, communicate, and promote Rotary in the districts they serve.

### Responsibilities

Per the Rotary Code of Policies (29.020.4.):

RCs understand and effectively communicate Rotary's:

- Strategic plan
- Annual goals and priorities
- Regionally appropriate membership attraction and engagement strategies
- New club and satellite club creation strategies
- Programs
- Focus on alumni importance

RCs lead by example locally and regionally by:

- Inviting at least one candidate to join their Rotary club each year
- Supporting effective member engagement activities in their Rotary club
- Effective use of Rotary's online tools

RCs actively promote:

- Strong, dynamic, flexible, and effective clubs
- Attraction of new members
- Engagement of current members
- New club and satellite club development
- Strategic planning at both the club and district level
- 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 connection, engagement, and commitment to Rotary



RCs confer with the RRFC and RPIC regarding annual candidates for the Rotary Alumni Global Service Award and the Alumni Association of the Year Award

### Training

RCs, working with their assistants and in collaboration with their regional leader team, plan and conduct the following training:

- Regional team training for their assistants
- Governors-elect training seminars. Those not invited to serve on the GETS training team are strongly encouraged to attend GETS to further deepen communication and collaboration with governors-elect and district leadership.
- Regional and other district seminars as needed, including regional membership seminars

As an RC, you'll hold an annual regional membership seminar to train district membership chairs (DMCs). Customize the [curriculum](#) provided by Rotary International to meet your region's needs. Seminars can be held in-person or online and you can use the membership courses available in the Learning Center to supplement your training or provide make-ups. You're responsible for carrying out the training and managing expenses. Work with staff in [Membership Development](#) to plan and hold your training.

## **Your Areas of Expertise**

### **Membership attraction and engagement**

Rotary's membership is our greatest asset; when our membership increases, our clubs are more vibrant, we have more to show the world, and we have more resources to help communities flourish. The membership experience is Rotary's highest *internal* organizational priority (polio eradication remains Rotary's highest *external* priority). Consider these strategies to help your district focus on membership.

#### Build capacity in the district

- Boost adoption of the membership leads system by encouraging districts and clubs to follow up on leads and providing training on how to use the tool effectively.
- Regularly review and discuss reports with district leaders that assess membership trends for their district. Provide strategies to overcome challenges and share success stories from districts that are seeing positive trends.
- Hold a regional membership seminar and collaborate with DMCs throughout your term to help them build their skills, knowledge, and resources. Find more information about the regional membership seminars below.
- Work with districts to develop innovative or satellite clubs that provide new club experiences and appeal to qualified but underrepresented audiences.
- Help districts identify opportunities to develop new Rotaract clubs, include Rotaractors in club and district projects and events, and invite Rotaractors to join Rotary clubs as a dual member of both Rotary and Rotaract.

#### Promote meaningful club experiences

- Encourage clubs to adopt flexible formats for club meetings and membership types. Provide clubs with membership resources so they understand the options and can determine which format best meets their members' needs.
- Encourage clubs to develop projects that address a community need or activities that appeal to people of different ages and backgrounds. Collaborate with your regional leader team to make sure high impact service projects are recognized in the community.
- Encourage clubs to embrace members with diverse skills, talents, and experiences. Support the inclusion of women, younger professionals, members of underrepresented backgrounds and industries, and Rotary alumni.

Encourage engagement beyond the club

- Promote opportunities for fellowship outside the club including [Rotary Fellowships](#) or [Rotary Friendship Exchanges](#).
- Promote programs and resources for international humanitarian service by encouraging members to join a [Rotarian Action Group](#).

Resources that can help clubs enhance their membership efforts are available on the [Membership page](#) of My Rotary. In addition, online membership courses are available to all members in the [Learning Center](#).

Resources to help clubs and districts develop effective projects locally and globally are available on the [Project Lifecycle Resources](#) page on My Rotary. Find more information on Rotary's programs on the [Programs page](#) of Rotary.org.

### **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 allows clubs and districts to develop continuity even as leadership changes.

Aligning club and district plans with the priorities of Rotary's strategic plan creates a common purpose that supports Rotary's growth. Achieving the goals in the Rotary Citation is one way clubs can support Rotary's strategic priorities. In your role, you can emphasize the importance of the citation to your clubs and districts.

Here are some ways you can encourage clubs and districts to develop strategic plans:

- Promote the District Planning Guide, linked in the Lead Your District: Governor manual, as a valuable resource to help the governor, governor-elect, and governor-nominee collaborate on strategic planning.
- Encourage districts to motivate clubs to develop and follow a strategic plan using the [Strategic Planning Guide](#) found on My Rotary.
- Encourage districts to create a leadership development plan and a succession plan, if they don't already have them.
- Recommend that districts involve incoming and immediate past leaders throughout the planning.

- Show leaders that monitoring data and tracking goals in Rotary Club Central creates a historical record that future leaders can use for planning and setting goals.
- Explain that the Rotary Citation goals are aligned with Rotary's strategic plan. Clubs that achieve the citation are stronger and more effective.
- Inform district leaders that their regional leader team is available to support their strategic plan and provide assistance throughout the year.

## **Alumni**

[Alumni](#) are a valuable part of the family of Rotary. You can help keep them involved in Rotary by encouraging district leaders to:

- Use the information in the [Program Participants and Alumni Report](#) to connect clubs with their alumni and maintain their relationship with Rotary
- Invite alumni to speak at club or district events and contribute to projects
- Promote club participation in [Reconnect Week](#) each October to focus attention on renewing alumni connections with Rotary
- Feature alumni who have contributed their time and talent to Rotary in your communications to district leaders

The RRFC, RC, and RPIC are involved in the nomination process for the two awards given annually to Rotary alumni: Rotary Alumni Global Service Award and Rotary Alumni Association of the Year Award. All Rotarians and alumni may submit the online nomination form from 1 July to 15 September. After the RRFC receives nominations from your region, work with them to select and submit a winner for each award to RI by 15 October. The winners for your region can be recognized at district or zone events.

Find resources to help you with your alumni duties on the [Alumni](#) page on My Rotary.

## ROTARY PUBLIC IMAGE COORDINATOR

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The purpose of RPICs is to proactively promote Rotary's strategic plan by helping clubs and districts identify and effectively tell compelling stories that demonstrate Rotarians as people of action to the public and within Rotary. RPICs also advise on local and regionally appropriate use of Rotary's brand and public image campaign materials. RPICs work in collaboration with district leaders to support and encourage clubs to have a robust media and social media strategy, an up-to-date website, and an engaging online presence in their local communities. As motivators, trainers, and advisers, RPICs help districts understand how to effectively secure local media coverage and promote Rotary special events and Rotary marketing in the districts they serve.

### Responsibilities

Per the Rotary Code of Policies (29.030.4.):

RPICs understand and effectively communicate Rotary's:

- Strategic plan
- Annual goals and priorities
- Coordinated public image building activities in a regionally appropriate manner
- Need for a consistent and unified Rotary brand and message
- Use of Rotary's visual identity assets, including the Brand Center, etc.
- Value of Rotarians and alumni in telling Rotary's story

RPICs lead by example, locally and regionally, by:

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

RPICs actively promote:

- Engagement of clubs and districts in coordinated public image activities as part of strategic planning
- 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 community impact by leveraging various communication channels, including media relations; online, social, and digital media; local advocacy; community engagement events; thought leadership; speaking engagements; marketing and advertising channels, etc.
- Well-maintained club and district websites
- The need for clubs and districts to have a robust social media presence
- Ways to highlight Rotarian and Rotary alumni stories
- Best practices for marketing Rotary special events and activities in local communities, such as World Polio Day, etc.
- 

RPICs promote that all Rotarians may suggest annual candidates for the Rotary Alumni Global Service Award and the Alumni Association of the Year Award. They also confer with the RRFC and RC on the selection of winners for these awards

### Training

RPICs, working with their assistants and in collaboration with their regional leader team, plan and conduct the following training:

- Regional team training for their assistants
- Governors-elect training seminars. Those not invited to serve on the GETS training team are strongly encouraged to attend GETS to further deepen their communication and collaboration with governors-elect and district leadership.
- Regional and other district seminars as needed, including a public image seminar

As RPIC, you may hold a public image seminar for current and incoming district leaders, including district public image chairs. The public image seminar should provide the tools and training needed to effectively promote Rotary and enhance Rotary's public image. The seminar can help district leaders plan public image outreach and campaigns, share success stories, and learn about Rotary's public image tools.

## **Your Areas of Expertise**

### **Telling Rotary's story**

From high-impact local projects and fundraisers to global efforts to end polio, Rotary has great stories to tell that can increase the public's understanding of who we are and what we do. As an RPIC, you can help district leaders learn best practices and find the tools and resources they need to tell Rotary's story.

Rotary's Voice and Visual Identity Guidelines, available on the Brand Center, can help clubs tell our stories effectively. The Brand Center is also where they'll find materials to promote Rotary's public image campaign, People of Action. As a champion of the campaign, you can lead by example by telling your club's stories in a clear, consistent, and compelling way, and promoting the benefits of using the campaign's materials to your districts and clubs.

### **Public image**

You'll work with district and club leaders on public image strategies and promote available Rotary resources on the Brand Center. Here are some ways you can focus their attention on public image:

- Regionalize existing guidelines on public relations, communication planning, and social media.
- Advise district leaders on Rotary's brand, including best practices for using Rotary's voice, visual identity, and public image campaign materials.
- Encourage district leaders to develop a communication plan.
- Promote use of online tools, such as the Brand Center, Rotary Club Central, [Rotary Ideas](#), and [Rotary Showcase](#).
- Encourage the use of social media to promote Rotary's story and its humanitarian efforts, and to communicate and engage with internal (Rotarian) and external (non-Rotarian) audiences.
- Look for ways to publicize noteworthy accomplishments in your region, and encourage district leaders to pursue media opportunities.

Resources that can help districts and clubs plan their public image strategies are available in the Rotary Public Relations Guide on the Brand Center. You can also encourage club and district leaders to use the [District Public Image Seminar Guide](#) and resources on the [Rotary Press Center](#), [Rotary Images](#), and [Rotary's Vimeo](#) and [YouTube](#) pages. Districts and clubs can find polio communication resources in the [End Polio Now Resource Center](#).

### **Alumni**

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

Encourage district governors and district public image chairs (DPICs) to publicize stories that highlight effective collaboration between alumni and Rotarians as well as significant alumni achievements, especially during [Reconnect Week](#) each October. You can also educate district leaders on the benefits of promoting alumni in public image campaigns.

The RRFC, RC, and RPIC are involved in the nomination process for the two awards given annually to Rotary alumni: Rotary Alumni Global Service Award and Rotary Alumni Association of the Year Award. All Rotarians and alumni may submit the online nomination form from 1 July to 15 September. After the RRFC receives nominations from your region, work with them to select and submit a winner for each award to RI by 15 October. The winners for your region can be recognized at district or zone events.

Find resources to help you with your alumni duties on the [Alumni](#) page on My Rotary.

## ENDOWMENT/MAJOR GIFTS ADVISER

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E/MGAs are the primary resource for major gift and endowment matters. They identify, cultivate, solicit, and steward donors with an emphasis on raising gifts of \$25,000 or more. E/MGAs collaborate with zone and district leaders and fund development staff partners to effectively fundraise for The Rotary Foundation's Endowment and programs.

### Responsibilities

Per The Rotary Foundation Code of Policies (5.030.4.):

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

- Inclusion in Rotary's strategic plan
- Annual goals and priorities
- Major gifts fundraising opportunities
- The importance of supporting Rotary's Endowment

E/MGAs lead by example locally and regionally by:

- Supporting major gift giving and participation in the Endowment
- Effectively using Rotary's online tools

E/MGAs actively promote locally and regionally:

- Continuous support of a polio-free world
- Strategies for encouraging major gifts, both outright and commitments, of \$25,000 or more
- Ways and opportunities to give major gifts to The Rotary Foundation, including Rotary's Endowment, PolioPlus, Rotary Peace Centers, and Areas of Focus Major Gift Initiatives
- The development of effective district endowment/major gift subcommittees
- Where regionally appropriate, the identification of Gift and Estate Planning Professionals in their region and provide opportunities for their involvement in district fundraising activities

E/MGAs are responsible for:

- Developing personalized cultivation and solicitation plans for prospective major gift donors annually, in consultation with fund development staff partners and other district leaders as appropriate
- Participating in or being productively involved with the solicitation of a minimum of three major gifts annually, with an emphasis on gifts of \$25,000 or more

- Planning cultivation activities for Foundation supporters and prospective Major Donors, in consultation with their director and/or trustee, RRFs, Areas of Focus MGI Committees, and other district leaders as appropriate
- Planning or helping to support the organizing of cultivation activities for Foundation supporters at the Rotary institute or other Rotary events
- Supporting the efforts of Areas of Focus MGI Committees working on cultivation activities
- Helping to identify potential donors using all resources available to them

E/MGAs, in collaboration with their regional leader team, plan and conduct regional and other district seminars as needed.

Work closely with your RI director and Foundation trustee, Fund Development staff partner, and E/MGA mentor to determine your priorities and create an action plan for your term.

## **E/MGA Support**

Though you do not have assistants, you have other resources available to support your work. You can draw on the expertise of an assigned mentor, Fund Development staff partner, and staff specialist. You may also use leaders in your districts as team members.

### **E/MGA mentors**

First- and second-year E/MGAs are paired with an experienced fundraiser as a mentor. The mentor supports your efforts to improve current fundraising techniques; helps you make introductions at the regional or district level; participates in cultivation, solicitation, or stewardship plans for important Rotary supporters; and assists with transition planning between predecessors and successors.

### **Staff partner**

Major Gifts officers (for North America) or Fund Development staff (based outside of North America) are the primary staff resource for identifying, cultivating, and soliciting major gifts and commitments. Their responsibilities include partnering with you to develop prospect lists, strategizing on individual or event-based cultivation activities, and encouraging district trainings. Your staff partner may be available to accompany you on solicitations and to help identify events and other opportunities to cultivate new prospects and manage existing donors.

### **Staff specialist**

Your staff specialist supports all E/MGAs worldwide. The specialist develops and promotes resources, drafts communications, fosters collaboration between regional leaders, and supports E/MGAs on reporting and measuring effectiveness. Contact your specialist at [emga@rotary.org](mailto:emga@rotary.org) to strategize on your role, get assistance with booking travel and budgeting, ask questions, and share best practices, success stories, and challenges.

## **Your Areas of Expertise**

### **The four-step process**



The four-step process for major gift cultivation is a proven formula for success. Share your expertise on the process with district leaders and work through the process with your staff partner.

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

### Major gifts

Rotary defines a major gift as a one-time outright gift or pledge of \$10,000 or more. Rotary defines a commitment — also called a bequest — as a donor's written intent to provide funds to Rotary from their estate, commonly through a will, insurance, or a retirement plan. To learn more about major gifts and bequests, visit [Rotary's Endowment](#) or view the giving resources on the [Donate](#) pages of Rotary.org.

We understand that cultural practices vary. In some regions, these differences may warrant a greater focus on outright gifts over bequests or vice versa.

As an E/MGA, you focus on encouraging and asking for major gifts, both outright and bequests, of \$25,000 or more. Using the four-step process, here's how you can secure major gifts:

- Use reports on My Rotary to understand major giving patterns within districts and find data on prospects. You can then work with district leaders and your fund development staff partner to make a cultivation plan.
- Use Rotary Club Central to review major gift and Endowment goals set by clubs and districts to better understand interest in major gifts.
- Work with the Areas of Focus Major Gifts Initiative committees when a donor has an interest in a specific area of focus.
- Update your prospect list regularly with potential donors and share with Foundation staff.
- Send thank-you notes to recent donors and personal, tailored messages to donors on your prospect list.

### The Rotary Foundation Endowment

Gifts to The Rotary Foundation Endowment ensure that future Rotarians will have the resources they need to design and implement sustainable projects year after year. While gifts to the Annual Fund help people live better lives today, planned gifts to the Endowment support these same life-changing programs forever.

As an E/MGA, you can support the Endowment by:

- Educating yourself on [Rotary's Endowment](#), how it supports Rotary programs, and why donors might be interested in supporting it

- Sharing the materials developed to support the Foundation's goal of building the Endowment to \$2.025 billion by 2025 with potential donors to showcase the Endowment's impact
- Giving presentations to district leaders to raise awareness of the Endowment
- Supporting district leaders in establishing and strengthening district Endowment/major gifts subcommittees and working closely with these committees to identify prospects
- Identifying potential donors and Bequest Society members

### **Directed gifts**

Donors can make outright gifts of \$15,000 or more to support a one-time global grant that will carry the name of the donor or their loved one. These directed gifts can be designated for an area of focus, a type of project, a geographic preference, or other options, depending on the gift's size.

Work with your staff partner to present the donor with an agreement to ensure that the directed gift meets the donor's expectations and follows Foundation guidelines. For any directed gift, donors will receive periodic reports from the Foundation explaining how their gift has been used.

### **PolioPlus**

Through 2020, every \$1 that Rotary commits to direct support for Rotary's PolioPlus program will be matched 2-to-1 (up to \$50 million per year) by the Bill & Melinda Gates Foundation. The End Polio Now — Countdown to History campaign will drive the effort to raise the final support that Rotary needs. The \$50 million annual goal for PolioPlus includes \$5 million each year in major gifts, together with ongoing club and district fundraising efforts.

Major gifts to PolioPlus should be outright rather than a bequest as polio may be eradicated by the time Rotary receives the estate gift. However, in cases where a donor prefers a bequest, a gift agreement that enables support for another purpose such as an area of focus may be drafted if the eradication goal has been reached when the gift is received.

You'll collaborate with your region's End Polio Now coordinator (EPNC) to identify and cultivate Major Donors interested in supporting polio eradication and to keep Rotarians informed about the status of Rotary's eradication efforts. Timely news and resources are available at [endpolio.org](http://endpolio.org).

### **Opportunities for corporate engagement**

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

## ASSISTANT COORDINATOR

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*RRFCs, RCs, and RPICs, please share this entire manual with your assistants. This section is designed specifically for them.*

As an assistant coordinator, you are in a position to extend the reach and effectiveness of your regional leader team (RRFC, RC, RPIC, E/MGA, and other assistants). You work with the other members of your team to support district leaders.

You are appointed annually, for up to three years, to ensure maximum effectiveness in the districts you serve and should not serve concurrently in other significant regional or district-level roles.

### **Assistant RRFCs**

Per The Rotary Foundation Code of Policies (5.020.6.), assistant RRFCs are selected by their RRFCs, in consultation with their director and trustee (if applicable), based on demonstrated success with grant participation and fundraising experience. You help the RRFC with education, motivation, and training about grants, programs, and giving opportunities. You support your regional leader with the RRFC responsibilities listed in section 1.

### **Assistant RCs**

Per the Rotary Code of Policies (29.020.6.), assistant RCs are selected by their RCs, in consultation with their director, based on demonstrated success and experience with regional membership attraction and engagement strategies, new club and satellite club development, strategic planning, and Rotary programs. You help the RC educate, motivate, and train clubs and districts about membership, strategic planning, and Rotary programs. You support your regional leader with the RC responsibilities listed in section 1.

### **Assistant RPICs**

Per the Rotary Code of Policies (29.030.6.), assistant RPICs are selected by their RPICs, in consultation with their director, based on demonstrated success and experience with marketing, media, or public relations. You help the RPIC educate, motivate, and train clubs and districts about the importance of telling Rotary's story. You support your regional leader with the RPIC responsibilities listed in section 1.

### **Your team**

The regional leader team — the RRFC, RC, RPIC, E/MGA, and assistants — as well as the End Polio Now coordinator (EPNC), as appropriate, work under the leadership of the RI director and collaborate with the trustee supporting their region. You report to the regional leader who

selected you. Your regional leader will determine how to delegate responsibilities to best fit the needs of your region.

### **Training**

Regional team training should take place before 1 July. Your regional leader will likely ask you to support or lead district trainings. Refer to section 4, Training, for more information.

### **Resources**

Your RRFC, RC, or RPIC is your main point of contact and can refer you to your staff specialist as needed. Rotary staff send updates directly to regional leaders who, in turn, share information with you. As a member of the regional team, you have the same access to resources that your regional leader does. See a list of publications, reports, and tools in section 5, Resources.

### **Travel and expenses**

The RRFC, RC, and RPIC budget includes funding for expenses incurred in your capacity as an assistant coordinator. Work with your regional leader to determine how to use the budget and which of your expenses can be reimbursed. Eligible expenses will be reimbursed so long as there is funding remaining in the budget to cover the costs. Your regional leader is in charge of maintaining the budget and keeping you informed.

It's your responsibility to follow all of the travel and expense guidelines listed in section 7, Budget. In addition, these guidelines apply specifically to assistant coordinators:

- Your travel requests and expense reports can't be approved until after staff has notified your regional leader of your eligibility. If your nomination isn't confirmed before your regional team training, you may not be reimbursed for travel or expenses relating to the event. For more on the assistant coordinator selection process, please see section 2, Key Relationships.
- Your regional leader must approve all of your travel requests and expense reports. To signify approval, copy your regional leader on all emails requesting travel or expense reimbursement. If your regional leader isn't copied on the email, staff will have to email them for approval, which will delay your reimbursement.
- Clearly indicate your role and staff specialist on all travel request and expense report forms. Your staff specialists can be contacted at [rrfc@rotary.org](mailto:rrfc@rotary.org), [rc@rotary.org](mailto:rc@rotary.org), or [rpic@rotary.org](mailto:rpic@rotary.org).
- Rotary must reimburse the individual who incurred the expense; you'll receive reimbursement for expenses you paid for directly from RI, not from your regional leader.
- Tell your regional leader the cost of any flights booked by RITS. After an itinerary is approved, give your regional leader the final cost so they can track the budget accordingly.

## 2. KEY RELATIONSHIPS

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Rotary's regional leaders — the RRFC, RC, RPIC, and E/MGA — work together in the districts they serve to encourage participation in Foundation programs, strengthen membership, enhance Rotary's public image, and increase giving. Together, you provide a vital link, not only between Rotarians at the club, district, and regional levels, but also between Rotarians and the Secretariat.

During your term, you'll also work closely with Rotary International directors, Rotary Foundation trustees, district leaders, End Polio Now coordinators, and fellow regional leaders. It's important to plan together and communicate regularly to maximize knowledge, skills, and resources.

### **Rotary Senior Leaders**

The trustee chair of The Rotary Foundation appoints RRFCs and E/MGAs. The RI president appoints RCs and RPICs. RI directors help regional leader teams reach their goals in the districts they serve. You'll want to regularly communicate, plan, collaborate, and cooperate with your RI director and either a trustee who resides in the zones of your director or within the greater geographical region as appropriate.

#### **Directors**

Each regional leader is expected to work in collaboration with their region's RI director. The director communicates a vision for their region and works alongside regional leaders to plan how to achieve their goals. Directors are responsible for leading regular meetings, facilitating teamwork, mentoring, advising on assistant selection, and promoting regional leaders in the zone. For more information about how directors work with the regional leader team, see the Rotary Code of Policies (28.080).

#### **Trustees**

Trustees serve as an essential Foundation resource in their zones. Under the RI director's leadership, each regional leader is expected to seek out support from the trustee in their region. Trustees' responsibilities to the regional leader team include attending regular meetings, facilitating teamwork, mentoring, and sharing their Foundation expertise. For more information about how trustees work with the regional leader team, see The Rotary Foundation Code of Policies (2.070).

## Other Regional Leaders

The regional leader team — the RRFC, RC, RPIC, and E/MGA — as well as the End Polio Now coordinator (EPNC), supports the priorities of Rotary's strategic plan, and promotes 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 training events whenever possible in your geographic area of responsibility
- Communicate with district leaders to facilitate stronger collaboration within the districts and region
- Encourage positive change in the districts you serve

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

### Succession planning

Throughout your term, it's important to collaborate with both the incoming and outgoing members of your team to share knowledge and to ensure continuity and consistency in your region.

If you're an incoming regional leader, meet with your predecessor before starting your term to learn about the region and role. Having this information will allow you to build on the progress that your predecessor has made while developing your plans for the upcoming year.

If you're an outgoing regional leader, share knowledge and expertise with your successor. This will help ensure that what you achieved will continue beyond your term.

See appendix 3 for a Succession Planning Guide for topics to cover during your conversations.

## Assistant Coordinators

RRFCs, RCs, and RPICs have assistant coordinators to support their districts. Given the unique aspects of their role, E/MGAs work directly with their mentor, their staff partner, and district leaders.

### Assistant selection

RRFCs, RCs, and RPICs select their assistants, in consultation with their director and any available resident trustee. Assistants are appointed annually, for up to three years, and should not serve concurrently in another significant regional or district role.

Your staff specialist will send you a link to an online form where you can select your assistant. This form must be completed at least two months before any regional team trainings your assistants are expected to attend. After you complete the form, staff will review the proposed assistants to ensure they are compliant with Rotary policy related to stewardship, youth protection, financial, and other obligations before the appointments are finalized. (Your

assistants' eligibility *must* be verified by staff in order to request travel or expense reimbursements using your regional leader budget, view regional reports, or access the Regional Leaders Workgroup.) Once this review is complete, your staff specialist will notify you via email.

Consider the following when selecting assistants:

- Geographic location
- Language abilities
- Special skills or experience
- Success in past district leadership roles
- Relationships or network outside their own district

Your RRFC, RC, or RPIC budget includes funding for assistants and will not change regardless of how many assistants you select.

### **Coordinator responsibilities**

You have the following responsibilities related to your assistants:

- Complete the assistant nomination form at least two months before any regional team trainings to ensure sufficient time for assistants to be vetted by staff.
- Assign responsibilities to assistants based on location, language abilities, or areas of expertise.
- Provide comprehensive training for your assistants, and work with your regional team to organize a joint regional training event if possible. Joint regional trainings involve all of the regional leaders and assistants in the region.
- Clearly communicate the budget and funding expectations to your assistants.
- Ask your assistants to copy you on all expense report or travel request emails to indicate your approval and avoid any delays in processing.
- Facilitate introductions and ongoing collaboration between your assistants and district leaders.
- Share updates and information from Rotary with your assistants.
- Provide this manual and other relevant resources to your assistants.

Refer assistants to section 1 for information about their roles and responsibilities.

## **District Leaders**

You and your regional team work in collaboration with district governors and other district leaders to connect Rotarians with resources that support Rotary's goals, priorities, and strategic plan. You serve as motivators and consultants year round and as trainers at Rotary institutes, GETS, and regional and district seminars when asked. You may also be invited to train or present directly to club leaders at a presidents-elect training seminar (PETS) or other club-level meetings.

### **District governors**

You'll work with the district governors, governors-elect, and governors-nominee to fulfill your responsibilities. So developing a good working relationship with them is critical to your success.

Consider these best practices when working with them:

- If you're a past district governor, think back to the kind of support you wanted from your regional leader and provide that support to your current governors.
- Ask governors about their communication preferences. For example, some governors may prefer to communicate with you via social media, text messages, video chats, or phone calls rather than email.
- Messages for club leaders will likely go through your district governors. If you do work directly with clubs, check with their district governors to coordinate your efforts.
- Attend training events such as governors-elect training seminars, where you can connect with current and incoming district governors and leaders from your region.
- Engage with past, current, and incoming district leaders to promote continuity and communication.
- Offer to work with them to provide training to district leaders.
- E/MGAs may work with district governors at different stages of the four-step process for Major Donors. If your governor has a strong relationship with a potential donor, you might include the governor in your solicitation.

### **District committee chairs**

District committee chairs are appointed by district governors to oversee a specific districtwide program, priority, or initiative. Work with your governor to explore how you can support committee chairs in implementing their initiatives. Here are some of the committee chairs you might work with:

RRFC	District Rotary Foundation committee chair District Rotary Foundation subcommittee chair District alumni committee chair District international service committee chair
RC	District membership committee chair District chair
RPIC	District public image chair
E/MGA	District endowment/major gifts subcommittee chair

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

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

To succeed, market yourself as an expert in The Rotary Foundation, member engagement, public image, or major gifts. Find out what the districts hope to accomplish during the year and show district leaders how you can help them achieve their goals. Be explicit about what assistance you can offer — share best practices, detailed action steps, and a clear objective. When district governors, governors-elect, and other district leaders need information, make yourself their first contact. Let others know what your mission is:

- RRFCs help Rotarians fully participate in their Foundation to meet their service and fundraising goals.
- RCs assist Rotarians in engaging current members and attracting new members to develop vibrant clubs and meet their membership goals.



- RPICs train Rotarians to tell the Rotary story in a compelling, consistent way and guide them in marketing, media outreach, and social media efforts.
- E/MGAs increase Rotarians' participation in major gifts fundraising and the overall impact of The Rotary Foundation.

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

### 3. GOALS AND REPORTING

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The president and trustee chair have developed organizational goals and priorities to coordinate the efforts of Rotary leaders at every level. Your regional leader goals are created to align with the Rotary Citation from the RI president, along with joint Rotary goals and Rotary's strategic plan. Each year, you'll have goals for your role as an RRFC, RC, RPIC, or E/MGA. These goals help quantify your impact, assess progress on a global scale, and support your region in meeting the overall organizational goals.

#### **Developing an Action Plan**

To reach your goals, you'll be asked to create an action plan with measurable targets and monitor your region's progress toward it throughout the year. Both your action plan and the targets you establish will be most effective when they are specific, measurable, achievable, and time bound. Before the beginning of the Rotary year, your staff specialist will send you an online form requesting your action plan for the year.

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

Consider looking at information in Rotary Club Central or other reports to get an idea of your region's status at various points during the past year. Use these benchmarks to create an initial outline of your action plan.

After you've thought about these factors, outline the steps needed to achieve your goals. Keep potential obstacles in mind and plan ahead to manage them. Consider assigning tasks to members of your team.

An action plan will help you identify how you'll measure success and the resources and tools you'll need to reach your targets. Ask your staff specialist for additional resources or guidance.

Be sure to monitor your progress as you work toward achieving your goals and make modifications if necessary. Later reports during the year will refer to the action plan you submitted, with the option to revise your plan as needed.

## **Reporting Your Progress**

As part of your responsibilities, you'll have three online reports to complete throughout the year. You'll receive an email with a link to the report form and will have two weeks to return it.

Twice per year, you'll be asked to complete a report that shows your progress toward goals, lists significant successes and challenges, and indicates any additional support or resources you need. You may also be asked for feedback on resources or initiatives. Once the report deadline has passed, directors, trustees, and regional leaders will receive an aggregate summary of the information provided. Should your director or trustee request additional data, your report may be shared with them.

Once per year, you'll review your performance in reaching outcomes, conducting activities, and improving your skills and knowledge. Your director and trustee will receive a copy of your self-assessment to inform their leadership and mentoring.

Consider these tips for filling out your reports:

- Keep track of training events, presentations, consultations, and seminars that you and your assistants perform.
- Review the questions in the report in advance (look in the Reports folder on the Regional Leaders Workgroup).
- Work with your assistants before completing the report to gather necessary information.
- Include any relevant newsletters, communications, and best practices with your report.
- Be specific about your success stories; provide information on how you identified and addressed challenges, what results you saw, and how your team has been following up.
- E/MGAs can use the prospect list template, available on the Regional Leaders Workgroup, to keep track of prospects.

## 4. TRAINING

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Incoming RRFs, RCs, and RPICs attend the Regional Leaders Training Institute (RLTI) to prepare for their roles. Incoming and first-year E/MGAs attend the Endowment/Major Gifts Training Institute (E/MGTI). Both training events give participants the chance to learn more about their role, exchange ideas, meet other leaders, and socialize. Throughout the year, additional opportunities are available to all regional leaders for distance learning and knowledge sharing.

You'll have opportunities to work with meeting conveners on training events in your region. Serving as a presenter, trainer, or resource at these events can be important to your role in 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 district leaders.

To help you plan a successful training, find tips and an overview of training seminars in appendix 2.

### **Regional Seminar**

The regional seminar is intended to inspire Rotarians, especially district leaders, and provide them with new information, resources, tools, and best practices to strengthen their clubs in the areas of The Rotary Foundation, membership, and public image. The seminar offers an opportunity to work together to address common challenges.

Work with your regional leader team to organize a joint district or multidistrict training seminar. Offer a variety of breakout sessions for attendees to choose from as well as general sessions relevant to all attendees. Consider inviting district governors, governors-elect, and relevant district committee chairs depending on the training topic.

A district or multidistrict seminar lets regional leaders address their region's district leaders as a team and promote broader initiatives. Consider these best practices:

- To accommodate schedules, hold the seminar as a one-day training event in conjunction with GETS, Rotary institute, or other key regional events, such as the regional membership seminar or regional Rotary Foundation seminar.
- Conduct a needs assessment so you can tailor the training to the needs of the attendees.

- Organize seminars by region, country, or groups of countries so that participants don't have to travel far.
- Use technology to host your seminar as conference calls or a webinar series.
- Review a sample seminar agenda, available on the Regional Leaders Workgroup, to help you plan an effective training.

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

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

During GETS, look for opportunities to introduce yourself to district governors-elect and other leaders, learn more about challenges in their districts, and offer your expertise and assistance.

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

- RRFCs: The Rotary Foundation and its grants, programs, and fundraising initiatives
- RCs: membership development, strategic planning, leadership development, Rotary service activities and programs
- RPICs: public image strategies and campaigns

RRFCs, RCs, and RPICs should work with the institute convener and GETS team leader to clarify your specific responsibilities and roles at GETS and institutes.

E/MGAs should plan to attend the Rotary institute in their region to meet with leaders and donors. You may be asked to organize donor recognition activities or be invited by the GETS team leader or institute convener to present or train participants. Take advantage of attending the institute or GETS to promote major gifts, cultivate current and potential Major Donors, and participate in both informal discussions and formal training.

If you're not a trainer but still attending, use your time at GETS to observe sessions, meet with district leaders and their partners, and support other regional leader team members by offering to present at general sessions. This is an ideal opportunity to establish and strengthen your relationships with district governors-elect and district governors-nominee.

## **Presidents-elect Training Seminar and District Events**

You won't be able to attend every district event or presidents-elect training seminar, but contact governors-elect to offer your support — especially for multidistrict PETS. It's a great way to meet officers at the club level. If you can't attend as a presenter, trainer, resource, or other role, consider sending an assistant, recording a video message, or asking the district to cover a portion of your costs.

## **Regional Team Training**

Your regional team training is an opportunity for you to meet as a team, plan for the year, and train assistants before 1 July. This event may include your full regional team — the RRFC, RC, RPIC, E/MGA, assistant coordinators, and EPNC — and the regional team from your paired zone. Discuss your training plans with your region's director and Foundation trustee and invite them to participate and share their expertise with your team. If an in-person meeting is too costly, host an online meeting or conference call.

Provide all participants, including assistants, with this manual and encourage them to review the relevant sections before the training. You're encouraged to supplement the training with topics and ideas that best serve your region and districts. Refer to the Resources folder on your workgroup to see sample agendas and discussion questions for your regional team training.

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

Depending on the size of your region, you may not be able to visit every district in person or regularly meet face-to-face with your team. You'll need alternatives. Webinars, online meetings, teleconferencing, and videoconferencing can help you meet your region's training needs throughout the year.

The most engaging webinars are interactive, practical, and discussion oriented. Though your role will be to present new concepts, you can use polls and the discussion pane to get participants involved. Online meetings, which are similar to conference calls, give participants the opportunity to exchange ideas and strategies with each other directly. Consider partnering with another regional leader to discuss a topic that is relevant to both your roles or regions. Many regional leaders find that sharing a webinar license for the region is an effective way of working together on distance learning and maximizing funding.

Check the Learning Center on My Rotary for online courses related to your areas of expertise. Then recommend them to members in your region as pre- or post-training or in place of in-person training.

## 5. RESOURCES

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In addition to this manual, you'll find many resources available to help you fulfill your responsibilities throughout your term. The resources below are designed specifically for you.

### **Regional Leader Insider**

The monthly newsletter, sent to all regional leaders and assistants, as well as senior leaders, has important updates, information about new resources, and success stories from the field.

### **The Advisor**

The quarterly Advisor newsletter, sent to E/MGAs, staff partners, and senior leaders, includes news and stories by and for E/MGAs.

### **Regional Leaders Workgroup**

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

### **Regional Leader Directory**

This directory presents an overview of all 41 regional teams, including each leader's role, name, contact information, photo, and districts they serve. Use this resource to connect with fellow regional leaders around the world. The directory is available on the Regional Leaders Workgroup.

### **Regional Team Training Guide**

This leader's guide will help you plan and conduct trainings for your regional team, including assistant coordinators. It includes a sample training agenda, group discussion topics, and an action planning template. The guide is available on the Regional Leaders Workgroup.

### **Reports on My Rotary**

On My Rotary, you have access to reports relevant to your role for each of your districts. Assistant coordinators have the same access to these reports.

### **Rotary Club Central**

In Rotary Club Central, you can access trends and reports for your region in the My Region tab, including information on membership, service, public image, and giving. You can also find more detailed information about each of your districts. Assistant coordinators have the same access to this information.

## 6. COMMUNICATION

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Strong leaders communicate regularly and with a purpose. Whether you're sharing regional initiatives, Rotary news, or other information, make sure it's relevant, timely, and tailored to your audience. Refer to Rotary's Voice and Visual Identity Guidelines on the Brand Center to make sure you're framing your message consistently.

### Creating Your Communication Plan

Before the year begins, think about how you'll communicate with your team and with district and club leaders. Your goal is not to tell districts or clubs how to work with Rotary, but rather to share with them the Rotary programs, resources, and tools that can help them meet their goals.

As you develop your communication plan, consult with your predecessor, director, trustee, and regional leader team. Remember to coordinate your communications as a team to prevent sending repetitive or conflicting messages and overwhelming your audience with excessive communication. Be intentional and plan major communications in advance so you have time to get feedback from your team. Whenever possible, make your call to action specific and customized to your intended audience.

Refer to the planning calendar in appendix 1 for suggestions about dates to include in your communication plan.

### Communication Channels

You can use a variety of platforms to communicate with Rotarians in your region. Typical channels of communication include email, phone, Skype, and text messaging, but other platforms may be more effective in your region. Talk with your district leaders to find out how they prefer to communicate and tailor your communication plan accordingly. For example:

- Use blogs or newsletters to tell success stories, promote effective resources, and share essential information with district leaders. Brief newsletters with a focused call to action are most effective.
- Use social media platforms to boost awareness of ongoing efforts and campaigns and to communicate with internal audiences, including district leaders.
- Send a personal email or call a district leader who is struggling or has done an exceptional job.



- Use webinars, videos, and other online learning platforms to explain a new initiative or provide training quickly and effectively with a team that may be geographically dispersed or needs to meet on short notice.

Communication goes both ways, so encourage your districts to tell you and other leaders their ideas, success stories, or concerns. You're in a position to pass this information to other districts, as well as to Rotary senior leaders and staff. Success stories and key strategies in which you took part can be shared through the Regional Leaders Workgroup, the Regional Leader Insider, and the Advisor.

You might also post photos and success stories in the Facebook group for your role. Your Facebook groups are a great way to connect with and learn from fellow regional leaders. Contact your staff specialist for more information.

## **Rotary Communications and Tools**

### **Discussion groups**

Rotary and Rotaract members can join and create [discussion groups](#) on My Rotary to share strategies, find potential service project partners, consult with service project experts, and engage with members of the Rotary community around the world. Groups can be open or invitation only. Join discussion groups related to your role and areas of expertise to begin connecting with other regional leaders and Rotarians.

### **Webinars**

Webinars organized by Rotary staff throughout the year keep you current on information from Rotary. Register for upcoming webinars and view archived recordings on My Rotary. Promote relevant webinars to members in your region.

### **Newsletters**

You automatically receive newsletters that are essential for your role, such as Rotary Leader and Regional Leader Insider. You can subscribe to Rotary newsletters on other topics on the Newsletters page on My Rotary.

## **General Data Protection Regulation (GDPR)**

Keep in mind that you are required to follow GDPR rules if you process the personal data of European Union residents. Review [what you need to know about data protection](#) rules on My Rotary for more information.

## 7. BUDGET

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Each regional leader has access to funds to reimburse eligible expenses specific to their role throughout the Rotary year. Review your responsibilities in section 1 to better understand role-specific duties. Then carefully review Rotary's [travel and expense policy](#), which includes guidelines for eligible expenses and reimbursement from regional leader funding.

You'll be notified of the exact amount of your budget by 1 July, after the Trustees and Board of Directors have approved it. Your budget responsibilities include:

- Following Rotary's [travel and expense policy](#)
- Determining how best to use your budget so it lasts throughout the year
- Tracking how much of your budget you and assistant coordinators (if applicable) use

### Travel and Expenses

To be eligible for reimbursement, you need to follow Rotary's [travel and expense policy](#), including using Rotary International Travel Service (RITS) to book your travel. Visit the [Travel & Expenses](#) page on My Rotary for expense report forms, official RI exchange rates, mileage reimbursement rates, and other relevant information.

#### Expense eligibility

Your budget will cover eligible expenses as defined in Part III (Business Expenses) of Rotary's travel and expense policy for participation in meetings, events, or activities that directly support clubs and districts in your region.

If you're not sure whether your budget will cover an expenditure, contact your staff specialist before incurring the expense.

#### Tracking expenses

You're responsible for tracking how much of your budget you and your assistants (if applicable) use. A budget tracking template is available on the Regional Leaders Workgroup.

Reimbursements for eligible expenses will be provided so long as you have the funds in your budget to cover the costs. If you would like to verify your balance, contact your staff specialist.

#### Submitting expenses

Email your expense reports, preferably as PDFs, to Rotary's Accounts Payable Department at [expensereports@rotary.org](mailto:expensereports@rotary.org). The Accounts Payable team will work with you throughout the

reimbursement process. Identify your regional leader role and the name of your staff specialist on the report. You must submit your detailed expense reports within 60 days from the last date of travel or when your expense was incurred, within the same Rotary year. Expenses submitted after 60 days will not be eligible for reimbursement.

Although we encourage you to work with other regional leaders to share costs (such as joint webinar licenses or regional trainings), an expense must be more than \$200 per person in order to share a single expense among multiple regional leader budgets. (For example, two regional leaders share a \$450 expense, and each leader requests that \$225 be reimbursed from their budget.) If the expense is less than \$200 per person, it can only be reimbursed from one person's budget.

### **Tips and reminders**

#### **Travel:**

- Use Rotary International Travel Service (RITS) to book your travel or consult with RITS before buying an air ticket yourself. If you have RITS approval to purchase a flight locally, attach documentation of the approval with your expense report.
- Copy your staff specialist on all travel requests you send to RITS.
- When seeking mileage reimbursement, specify use of either miles or kilometers and include your travel dates.
- Ask your assistants to provide you with the cost of their flight once it's booked so you can include that information in your budget tracking.

#### **Expenses:**

- Plan your budget for the whole year.
- Check receipt images for clarity when including them in an email.
- Make sure your hotel folio shows a zero balance. If it doesn't, you must also provide proof of payment, such as a credit card statement.
- Remove all but the final four digits on an account number when sending credit card or bank statements to ensure your data security. If you send a credit card or bank statement as proof of payment, you must also include the receipt.
- You don't need to print and sign your expense report form. Your email serves as your signature.

### **Regional team training expenses**

Regional team training (see section 4) expenses are funded by the current regional leader's budget. Outgoing regional leaders should coordinate with their successor and set aside enough funds for this training. If funding is exhausted on the team training, additional funding will not be provided.

### **Assistant coordinators' expenses**

If you're an RRFC, RC, or RPIC, your budget includes funding 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 year-end deadlines, communicate budget limitations, and track their use of funds. Assistants need to copy you on all travel request and expense report emails to indicate your approval. Failure to copy you on requests slows the approval process, delaying travel booking and reimbursements.

Because funding is limited, your budget 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 budget, you'll need to inform your assistants and develop a plan for how to respond to pending requests from the region.

Rotary must reimburse the individual who incurred the expense. Assistant coordinators will receive reimbursement for expenses they paid for directly from RI, not from their regional leader.

**Other RI funding**

Your regional leader budget is distinct from any other RI funding you may receive, such as donor recognition activity funding, regional membership seminar funding, or president's representative travel. The guidelines for your regional leader budget are also distinct. It is your responsibility to follow the appropriate guidelines.

## APPENDIX 1: REGIONAL LEADERS' PLANNING CALENDAR

This calendar includes items for regional leaders during the year of service. You may want to add your own dates and notes for your reference.

DATE	ACTION
<b>Ongoing</b>	<ul style="list-style-type: none"> <li>• Host regular conference calls, webinars, or email check-ins with your team members.</li> <li>• Distribute regional newsletters or other communications as appropriate.</li> </ul>
<b>July</b>	<ul style="list-style-type: none"> <li>• <b>Submit your targets and action plan form.</b> Your staff specialist will send a link to the form between May and June.</li> <li>• Receive confirmation of budget amount from RI.</li> <li>• Send a motivational message to all district leaders to mark the start of the Rotary year.</li> <li>• RRFCs: Send congratulations to those who have achieved their Foundation goals.</li> <li>• RRFCs and E/MGAs: Lead by example and make your annual gift.</li> <li>• RRFCs, RCs, and RPICs: Decide on dates for regional and district seminars.</li> <li>• RCs: Develop strategies and plans for celebrating Membership and New Club Development Month in August.</li> </ul>
<b>July-September</b>	<ul style="list-style-type: none"> <li>• RRFCs, RCs, and RPICs: Encourage districts to set their membership, fundraising, service, and public image goals in Rotary Club Central.</li> <li>• RRFCs and RPICs: Encourage districts to begin planning for World Polio Day on 24 October.</li> <li>• RRFCs: Promote leadership gifts from district and club leaders.</li> <li>• RRFCs: With the assistance of the RC and RPIC, review candidates for the Rotary Alumni Global Service Award and Alumni Association of the Year award.</li> <li>• RCs: Identify and promote successful projects.</li> <li>• E/MGAs: Work with your staff partner or specialist to plan how you'll cycle donors through the four-step process.</li> </ul>
<b>August</b>	<ul style="list-style-type: none"> <li>• RCs: Organize an event or activity for Membership and New Club Development Month.</li> </ul>
<b>August-December</b>	<ul style="list-style-type: none"> <li>• RRFCs, RCs, and RPICs: Hold regional seminars in conjunction with Rotary institutes or other events.</li> <li>• RRFCs, RCs, and RPICs: Serve as a training team member at GETS and the Rotary institute if the convener has invited you to be a trainer.</li> <li>• E/MGAs: Hold a donor recognition activity in conjunction with a Rotary institute. Plan accordingly for regional Arch Klumph Society inductions.</li> </ul>

<p><b>September</b></p>	<ul style="list-style-type: none"> <li>• Staff announces appointment of incoming regional leaders.</li> <li>• Third-year regional leaders: Contact your successor to begin preparing them for the role.</li> <li>• RRFCs and E/MGAs: Encourage districts to begin planning for Rotary Foundation Month in November. Begin actively promoting year-end gifts.</li> <li>• RPICs: Watch for districts that may need help organizing an event for World Polio Day, and provide guidance on planning and publicizing the event.</li> </ul>
<p><b>October</b></p>	<ul style="list-style-type: none"> <li>• <b>Complete your first progress report.</b> Your staff specialist will send a link to the form.</li> <li>• Support World Polio Day on 24 October             <ul style="list-style-type: none"> <li>○ RPICs: Help your districts share success stories with local media. Tell your staff specialist about successes in your district.</li> <li>○ RRFCs and RCs: Promote Rotary's activities around the world.</li> <li>○ E/MGAs: Use World Polio Day as a catalyst for meeting with a prospect interested in the cause.</li> </ul> </li> <li>• Celebrate Reconnect Week             <ul style="list-style-type: none"> <li>○ RRFCs: Submit nominations for the Rotary Alumni Global Service Award and Alumni Association of the Year award by 15 October.</li> <li>○ RCs: Encourage clubs to contact alumni and provide meaningful opportunities to renew their connection to Rotary.</li> <li>○ RPICs: Promote the good work alumni are doing in your community.</li> </ul> </li> </ul>
<p><b>November</b></p>	<ul style="list-style-type: none"> <li>• RRFCs, RCs, and RPICs: Your specialist will send you a link to the assistant selection form. Submit your selections at least two months before any assistant training and by April at the latest.</li> <li>• RRFCs and E/MGAs: Promote year-end giving.</li> <li>• RRFCs and E/MGAs: To mark Rotary Foundation Month, encourage districts to have their clubs plan at least one Foundation-related program.</li> </ul>
<p><b>December</b></p>	<ul style="list-style-type: none"> <li>• RRFCs and E/MGAs: Continue to promote year-end giving.</li> <li>• RRFCs, RCs, and RPICs: Begin discussions with district governors-elect about opportunities to support presidents-elect training seminar.</li> <li>• Begin planning your regional team training.</li> </ul>
<p><b>January</b></p>	<ul style="list-style-type: none"> <li>• <b>Complete your regional leader self-evaluation form.</b> Your staff specialist will send a link to the form.</li> <li>• Receive next year's regional leader goals.</li> <li>• Contact district governors-elect after the International Assembly to offer your support as they prepare for their term.</li> <li>• Encourage clubs to celebrate Rotary's anniversary on 23 February.</li> </ul>

<b>February</b>	<ul style="list-style-type: none"> <li>• Contact governors-elect and incoming district committee chairs.</li> </ul>
<b>February-April</b>	<ul style="list-style-type: none"> <li>• RRFCs, RCs, and RPICs: Participate in the presidents-elect training seminar and district assemblies as appropriate.</li> <li>• RRFCs, RCs, and RPICs: Complete the assistant selection form online.</li> </ul>
<b>March</b>	<ul style="list-style-type: none"> <li>• Incoming RRFCs, RCs, and RPICs: Attend the Regional Leaders Training Institute.</li> </ul>
<b>April</b>	<ul style="list-style-type: none"> <li>• Follow up with incoming district leaders. Ask how you can help them and encourage appointments for any vacant district chair positions.</li> <li>• Plan for regional and district seminars.</li> <li>• Incoming and first-year E/MGAs: Attend the Endowment/Major Gifts Training Institute.</li> <li>• RRFCs, RCs, and RPICs: Encourage incoming district leaders to work with the incoming club presidents to set their goals in Rotary Club Central and to encourage current club leaders to continue making progress toward the Rotary Citation.</li> </ul>
<b>April-June</b>	<ul style="list-style-type: none"> <li>• Conduct your regional team training.</li> <li>• Work with your director, trustee, and regional leader team to develop a communication plan for the coming year and establish your targets and action plan for your regional leader goals.</li> <li>• Conduct training for committee chairs, if applicable.</li> <li>• Plan for GETS, regional seminars, donor recognition events, or any other meetings held in conjunction with the Rotary institute.</li> <li>• Outgoing regional leaders: Complete the form to recommend candidates for your successor. Staff will send you a link to the form.</li> </ul>
<b>May-June</b>	<ul style="list-style-type: none"> <li>• RRFCs, RCs, and RPICs: Encourage club leaders to submit their Foundation giving, membership, and public image goals in Rotary Club Central to earn the Rotary Citation.</li> <li>• RRFCs: Send year-end reminders to districts and offer to help them meet their annual giving goals.</li> <li>• RCs: Encourage clubs to update their membership records to prevent unexpected year-end drops.</li> </ul>
<b>June</b>	<ul style="list-style-type: none"> <li>• <b>Complete your year-end progress report.</b> Your staff specialist will send a link to the form.</li> <li>• Submit your year-end expense reports by the deadline.</li> <li>• RRFCs, RCs, and RPICs: Encourage club leaders to submit their goals in Rotary Club Central to earn the Rotary Citation.</li> <li>• Send thank-you messages to the outgoing district officers you've worked with and welcome letters to the incoming officers you'll work with in the year ahead.</li> </ul>

## APPENDIX 2: TRAINING SEMINARS

TRAINING MEETING AND TIMING	PURPOSE	CONVENER AND ORGANIZER	MATERIALS (on Regional Leaders Workgroup or <a href="#">Learn by role</a> page, under Learning & Reference, on My Rotary)
<p><b>Regional team training</b> Determined by the regional team</p>	<p>Meet as a team (including E/MGAs and EPNCs as appropriate), plan for the year, and train assistants.</p>	<p><b>Convener:</b> RRFC, RC, or RPIC (scheduled by director)</p>	<p><b>For leaders:</b> Regional Team Training Guide <b>For participants:</b> Regional Leader's Manual and Regional Leader Goals</p>
<p><b>Regional seminar</b> Held in conjunction with GETS and Rotary institute, or at another time as appropriate</p>	<p>Inspire Rotarians, especially district leaders, and provide new information, resources, tools, and an opportunity to share best practices.</p>	<p><b>Convener:</b> RRFC, RC, or RPIC</p>	<p><b>For leaders:</b> See sample joint regional agenda on the Regional Leaders Workgroup</p>
<p><b>Regional Rotary Foundation seminar</b> Held in conjunction with GETS and Rotary institute</p>	<p>Club and district leaders learn about zone-level Rotary Foundation initiatives, and regional leader team receives goals.</p>	<p><b>Convener:</b> RRFC</p>	<p><b>For leaders and participants:</b> <a href="#">Lead Your District: Rotary Foundation Committee Manual</a></p>
<p><b>Regional membership seminar</b> Held in conjunction with GETS and Rotary institute or other regional training to maximize available funding</p>	<p>RCs use RI-provided curriculum to train district membership chairs on effective membership development strategies.</p>	<p><b>Convener:</b> RC</p>	<p><b>For leaders:</b> <a href="#">Regional membership seminar curriculum</a> <b>For participants:</b> Membership courses on the Learning Center</p>
<p><b>Governors-elect training seminar (GETS)</b> August-December; regional training in conjunction with Rotary institute</p>	<p>Governors-elect learn about their responsibilities.</p>	<p><b>Convener:</b> RI director or immediate past director</p>	<p><b>For leaders:</b> <a href="#">Governors-elect Training Seminar Leader's Guide</a> <b>For participants:</b> <a href="#">Lead Your District: Governor</a></p>



<p><b>International Assembly</b> Before 15 February</p>	<p>Governors-elect receive instruction, motivation, and inspiration. Learning builds on GETS.</p>	<p><b>Conveners:</b> RI president and president-elect <b>Organizer:</b> Moderator</p>	<p><b>For leaders:</b> International Assembly Leader's Guide <b>For participants:</b> <a href="#">Governor-elect Workbook</a></p>
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For more training events convened by the district governor-elect or district governor, see [Lead Your District: Training](#). Work directly with your district leaders to determine if you or your team has a role in these trainings.

## APPENDIX 3: SUCCESSION PLANNING GUIDE

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After your successor has been announced, arrange a call or a meeting to discuss the needs of your region, ongoing projects, and relationships. Throughout the last year of your term, work with your successor to pass on the knowledge you've gained.

Here are some topics to consider.

TOPICS	BEST PRACTICES
Regional context	<ul style="list-style-type: none"> <li>• Share anything that helped you better understand the unique challenges and opportunities in your region.</li> <li>• Explain any cultural or language differences within your region that would be helpful for your successor to know.</li> <li>• Share any impact that the rezoning is having on your region and help your successor understand how your region fits into the larger zone structure.</li> </ul>
Regional and district relationships	<ul style="list-style-type: none"> <li>• Introduce your successor to district leaders in the region. You can also access a list of district leaders through the Reports page of Club and District Administration on My Rotary.</li> <li>• Share non-Rotary contacts that were useful to you.</li> <li>• Describe which relationships are already strong and which can be strengthened in the future.</li> <li>• Begin including your successor in communications, training events, and webinars.</li> <li>• Provide guidance on established relationships with your RI director, Foundation trustee supporting your region, and other regional leaders.</li> <li>• RRFCs, RCs, or RPICs: Offer to consult on candidates for assistant RRFCs, RCs, or RPICs.</li> <li>• E/MGAs: Discuss who will maintain relationships with donors already in the four-step process.</li> </ul>
Staff support	<ul style="list-style-type: none"> <li>• Talk to your successor about how you work with staff at Rotary's world headquarters and international offices. Who do you work with in your regional leader role and what support can they provide?</li> <li>• Include staff in your succession planning discussions as appropriate.</li> </ul>
Projects	<ul style="list-style-type: none"> <li>• Share any successful initiatives, projects, or events you've started in your region and encourage your successor to continue them. Be sure to mention any key contacts, participating clubs or districts, or partner organizations.</li> </ul>
Regional strategies	<ul style="list-style-type: none"> <li>• Share any strategies you identified or developed that successfully addressed challenges in your region.</li> <li>• Discuss any opportunities for growth and how you have been working on them.</li> </ul>
Resources	<ul style="list-style-type: none"> <li>• Provide your successor with any templates, guides, presentations, or training materials you developed.</li> <li>• Create or update a shared online storage site, or something regionally appropriate, for your regional team's documents.</li> </ul>

	<ul style="list-style-type: none"><li>• Explain how you use Rotary reports and resources (such as Rotary Showcase, Rotary Ideas, and the Brand Center).</li><li>• Reserve adequate funds in your budget for your successor's regional team training.</li></ul>
Goals and targets	<ul style="list-style-type: none"><li>• Share your previous targets and action plans. Advise your successor on setting targets and developing action plans, and encourage collaboration with other regional leaders.</li></ul>
Scope of the role	<ul style="list-style-type: none"><li>• Discuss what fell under your role as a regional leader. Help your successor understand the boundaries between your role and the roles of your fellow regional leaders, the district leaders, and the assistant coordinators.</li><li>• Discuss the administrative element of the role and any challenges that arose from leading a team, managing a budget, or planning annual communications and trainings.</li></ul>

If you need additional help with planning your transition, contact your staff specialist.



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