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# REGIONAL LEADER'S MANUAL

SIXTH EDITION



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## *Regional Leader's Manual*

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.

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## 1. YOUR ROLE

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The term “regional leaders” refers to regional Rotary Foundation coordinators (RRFCs), Rotary coordinators (RCs), Rotary public image coordinators (RPICs), endowment/major gifts advisers (E/MGAs), and End Polio Now coordinators (EPNCs). Regional leaders work with district leaders to connect Rotarians to resources that support Rotary’s goals and deepen its impact in communities locally and around the world. Regional leaders also serve as trainers and facilitators at Rotary institutes, governors-elect training seminars, regional and zone seminars, district training meetings, and other events when asked.

### **Regions**

Regional leaders work with groups of districts called regions. These regions can encompass an entire zone, part of a zone, or parts of more than one zone. The regions coexist with — but are independent from — the zone structure.

When referring to their regions, regional leaders can use the terms that will best resonate with local Rotarians. Some use a zone or geographic identifier, while others refer to their region number. If you use the term “region,” please make sure that club- and district-level Rotarians understand that a region does not replace or supersede a zone.

You can download a list of districts in each region from the Regional Leaders Workgroup.

### **Diversity, Equity, and Inclusion**

Consider how you and your team can model diversity, equity, and inclusion for districts and clubs in your region. Review the [Diversity, Equity, and Inclusion Statement](#) on My Rotary for more information.

Take the following courses in the [Learning Center](#) to help keep members safe:

- Committing to Diversity, Equity, and Inclusion
- Preventing and Addressing Harassment
- Protecting Youth Program Participants
- Unconscious Bias

## **REGIONAL ROTARY FOUNDATION COORDINATOR**

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The purpose of RRFCs is to proactively promote The Rotary Foundation's goals and Rotary's Action Plan by facilitating increased giving to and participation in The Rotary Foundation's Annual Fund and greater participation in The Rotary Foundation's grants and programs. RRFCs work in collaboration with district leaders 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](#) (24.020.4.):

RRFCs understand and effectively communicate 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
- 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 achieving a polio-free world
- Opportunities in all available 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

## **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 and governors-nominee training seminars if invited by the convener; those who are not invited to serve on the training teams are strongly encouraged to attend GETS and GNTS to deepen communication and collaboration with future governors and district leaders
- 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 demonstrate 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 the 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 achieving 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 find new donors. Ideas for doing this include educating new members about The Rotary Foundation and encouraging participation by promoting the Every Rotarian, Every Year (EREY) fundraising initiative.
- Promote Rotary Direct, the Foundation's recurring giving program.
- Encourage donors to become Sustaining Members or Paul Harris Society Members. Strong participation in these donor recognition programs 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.

If you see a district that's struggling to spend its District Designated Fund surplus, offer your support and expertise. Contact the district Rotary Foundation committee to make sure that it is clearly communicating the district's DDF policy to clubs and that they understand how DDF accumulates from one year to the next. If you see a district that is fully using its DDF, celebrate its success and share its strategies throughout your region.

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 grant application, approval, implementation, and reporting. As part of your role, you should be knowledgeable about Rotary grants and be available to answer questions and offer training. To learn more about grants, review the [grants](#) pages on My Rotary.

Support district leaders during the grants process by:

- Offering them help with the grant application process
- Encouraging them to attend regional seminars to learn about community assessments, sustainability, areas of focus criteria, and other grant guidelines
- Suggesting they talk to new audiences, including Rotaractors, to increase participation in global grants (Rotaractors will be allowed to partner on global grants starting 1 July 2022)
- 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 grant application has been pending for a while
- Promoting district international service chairs as people who can help applicants find international partners
- Encouraging them to consult 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 priority. Work with your EPNC to raise awareness of polio, fundraise for PolioPlus, and increase the number of clubs that give to 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](http://endpolio.org).

Information and resources for club and district PolioPlus fundraising and advocacy efforts can be found at [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

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

## **Rotary Peace Fellowships**

Rotary Peace Fellowships are the flagship program of our peacebuilding and conflict prevention 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 that have questions about peace fellowships by:

- Sharing the peace fellowship application and explaining district endorsement process
- Connecting clubs and districts with program alumni for speaking engagements and 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 and Legacy 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](#) (contact [plannedgiving@rotary.org](mailto:plannedgiving@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 Action 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 participant 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:

- Action 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
- Using Rotary's online tools effectively

RCs actively promote:

- Strong, dynamic, flexible, and effective clubs
- Strategies for attracting new members, including effective use of the Membership Leads system
- 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

## **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-nominee and governors-elect training seminars if invited by the convener; those who are not invited to serve on the training teams are strongly encouraged to attend GNTS and GETS to deepen communication and collaboration with future governors and district leaders
- Regional and district seminars as needed

## **Your Areas of Expertise**

### **Membership**

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. Membership is Rotary's highest *internal* organizational priority (polio eradication remains Rotary's highest *external* priority).

Consider these strategies to help your districts focus on membership.

Support district leaders:

- Regularly review and discuss membership trends with district leaders using Rotary's membership reports. Provide data-driven strategies to overcome challenges, and share success stories from districts with positive trends.
- Encourage 100% completion of the district membership chair (DMC) certification requirement by membership chairs in your districts.
- Offer ongoing support and development for your 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, chat, or social media groups.

Attract new audiences:

- 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 adoption of the membership leads system by encouraging districts and clubs to follow up on leads and providing training in how to use the tool effectively.
- Remind club and district leaders that prospective members who are seeking a different Rotary experience than the one offered by the clubs in their area can be part of a new club or a satellite club.
- Work with districts to develop innovative clubs, including satellite clubs, that provide new experiences and appeal to underrepresented groups.
- Help districts find opportunities to develop new Rotaract clubs and invite Rotaractors to join Rotary clubs as dual members of both Rotary and Rotaract.

- Remind district leaders that many Rotary programs, such as Rotary Fellowships and Rotary Friendship Exchange, are open to nonmembers and can introduce prospective members to Rotary.

Promote meaningful club experiences:

- Encourage clubs to adopt flexible formats for their meetings and offer the membership types that best meet their members' needs.
- Provide membership resources to help clubs and districts develop strategies to keep members active and involved.
- Recommend regular club assessments to ensure that members' feedback is received and acted upon.
- Encourage clubs to develop projects that address a community need or conduct 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 provide opportunities for their members to develop personally and professionally and promote the courses and resources available through [Rotary's alliance with Toastmasters International](#).

Encourage greater member and participant engagement beyond the club:

- Promote opportunities for greater connection through [Rotary Fellowships](#) or [Rotary Friendship Exchange](#).
- Include Rotaractors in club and district projects and events.
- Promote programs and resources for international humanitarian service by encouraging members to join a [Rotary Action Group](#), and encourage broader community support for local projects by promoting the formation of [Rotary Community Corps](#).
- Encourage clubs to involve the community in various activities they sponsor.
- Collaborate with the RRFC team and district committees, such as the community service committee and the international service committee, to promote member engagement through service.

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.

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.

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

- Educate districts about how Rotary's Action Plan will ensure a stronger and even more effective Rotary in the future.
- Promote use of the [District Planning Guide](#) and [Strategic Planning Guide](#) as valuable resources to help with club and district planning.
- Encourage districts to create a leadership development plan and a succession plan, if they don't already have them.
- 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 clubs can receive the Rotary Citation by selecting and achieving the Rotary Club Central goals that are most relevant to them.
- Inform district leaders that their regional leader team is available to support their strategic plan and provide other support 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
- 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 their communications

Find resources 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 Action Plan by helping clubs and districts expand our reach and effectively tell compelling stories that demonstrate Rotarians as people of action. 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:

- Action 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
- Correct 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 brand to enhance its public image in their own club websites and social media channels
- 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 to facilitate improvement
- Having a visible and vibrant traditional media or digital media presence

RPICs actively promote:

- Engagement of clubs and districts in coordinated public image activities as part of strategic planning
- Use of Rotary's Brand Center and other online tools to tell Rotary's story
- Correct use of Rotary's brand and visual identity
- Consistent and unified Rotary messaging

- Clubs and districts telling stories about their community impact by leveraging various communication channels
- Ways to highlight Rotarian and Rotary alumni stories
- Best practices for marketing Rotary events and activities in local communities

## **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-nominee and governors-elect training seminars if invited by the convener; those who are not invited to serve on the training teams are strongly encouraged to attend GNTS and GETS to deepen their communication and collaboration with future governors and district leaders
- 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**

### **The Rotary brand**

Consistent brand messaging and visual identity are critical to improving awareness and understanding of 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.

Consider using these strategies to help your districts focus on brand:

- Encourage district leaders to follow the guidance on Rotary's Brand Center, and provide support as they create materials.
- Educate district leaders about the importance of using Rotary's visual brand consistently and correctly. Make sure district leaders know where to find resources that they can use to update their logos and materials. Design or revise your training materials to focus on what is most important for districts to update.
- Assist leaders in assessing the use of Rotary's brand resources in the region and discuss the findings.
- Share success stories of how districts and clubs aligned with Rotary's brand and updated their assets. Use messages about branding and Rotary that are encouraging and positive.
- Encourage leaders to complete brand and public image courses in the Learning Center.

- Offer ongoing support and development for your district public image chairs through regular conference calls or consultations.
- Provide virtual or in-person opportunities for your district public image chairs to connect with one another.

### **Building Rotary's public image**

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

- Promote the benefits of appointing district and club public image chairs.
- Encourage district leaders to develop a communication plan.
- Advise district leaders on Rotary's brand, including best practices for using Rotary's voice, visual identity, and public image materials.
- Promote use of online tools, such as the Brand Center, Rotary Club Central, Rotary Showcase, and the Learning Center.
- Highlight Rotary's impact and show members as People of Action in digital assets.
- Communicate and engage with internal and external 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 develop public image strategies are available in the [Brand Center](#). They can find polio communication resources in the [End Polio Now Resource Center](#).

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

From high-impact local projects and fundraisers to global efforts to end polio, Rotary has impressive stories to tell. Those stories can increase Rotary's impact and the public's understanding of who we are and what we do. The most effective way to present Rotary's stories to prospective members or supporters who do not fully understand what we do in local communities is by using our People of Action messaging. This campaign aims to provide a simple, consistent message and rally Rotarians around a single idea: that we are people of action — professional, community, and civic leaders who share a passion for taking action to improve our communities.

As an RPIC, you help district leaders learn best practices and find the tools and resources they need to tell those stories in a clear, consistent, and compelling way to those who *don't* know us. Rotary's [Brand Center](#) has resources that you can recommend to district leaders, including:

- The People of Action Campaign Guidelines, which has hands-on tips for using the campaign in the most effective way
- Premade People of Action materials (visual, audio, video) and templates for creating custom materials

As a champion of the campaign, you lead by example by telling compelling and inspiring club stories through various media platforms and promoting the benefits of using the campaign's materials to your districts and clubs.

## **Alumni**

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

- Invite alumni to speak at club or district events
- Publicize stories that highlight effective collaboration between alumni and members as well as significant alumni achievements
- Promote club participation in [Reconnect Week](#) each October to focus attention on renewing alumni connections with Rotary
- Promote alumni in public image campaigns
- Encourage alumni to tell their Rotary stories
- Remind all Rotarians that they can suggest candidates for the annual Rotary Alumni Global Service Award and Rotary Alumni Association of the Year Award

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

## **ENDOWMENT/MAJOR GIFTS ADVISER**

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E/MGAs are the primary resource for major gifts and endowment fundraising matters. They identify, cultivate, solicit, and steward donors with an emphasis on securing 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. They work closely with the areas of focus major gifts initiative committees on events and outreach targeting specific areas of focus or Rotary Peace Centers contributions.

### **Responsibilities**

Per The Rotary Foundation Code of Policies (24.030.4.):

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

- Inclusion in Rotary's Action 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 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 gifts initiatives
- The development of effective district endowment/major gifts 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, RRFCs, areas of focus major gifts initiative 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 major gifts initiative 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, including governors-elect and governors-nominee training seminars if invited by the convener. Those not invited to serve on the training teams are strongly encouraged to attend GNTS and GETS to deepen communication and collaboration with future governors and district leaders.

Work closely with your RI director, Foundation trustee, and Fund Development staff partner 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 your Fund Development staff partner, areas of focus major gifts initiative committee members, and staff specialist. You might also ask district leaders to help you.

### **Staff partner**

Major gifts officers (for North America) and Fund Development staff (based outside of North America) are the primary staff resources 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 major gift prospects and manage existing donors.

### **Areas of focus major gifts initiative committees**

Areas of focus major gifts initiative committee members are unique long-term fundraisers who work to identify, cultivate, and solicit donors who may have an interest in supporting specific areas of focus or the Rotary Peace Centers. Their emphasis is on raising endowment support through outright gifts and commitments of \$50,000 or more. Committee members nurture relationships with donors and prospects that lead to an increase in major gift support for the areas of focus and Rotary Peace Centers. Major gifts initiative committee members serve as a resource for and collaborate with E/MGAs on their area of expertise. You can work closely together to host targeted cultivation, solicitation, and stewardship events for Foundation supporters and prospective supporters.

### **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**

Engaging a donor involves four steps: identification, cultivation, solicitation, and stewardship. These steps usually come in that order, but not always. You may have to move back to a previous step depending on the prospective donor's needs. Think of the process as a circle rather than a line, because your relationship with a donor should not end after they've made a gift and been appropriately thanked. Throughout the four-step process, your actions should be focused on the donor. Help the donor decide how and where to direct their gift, based on their interests and passions, to maximize its impact.

Share your expertise in the four-step process with district leaders and work through the process with your staff partner.

Learn more about the process in the Fundraising Basics course in [Rotary's Learning Center](#).

### **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 [Legacy](#) and [Planned Giving](#) pages of Rotary.org.

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.

- Use reports, such as the Monthly Major Gifts Report, to find donors to recognize through phone calls, thank you notes, or presentation of recognition items. Consider sending 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
- Sharing information about the [Legacy Society](#) and working with staff partners to welcome new members to the society
- Working with district endowment/major gifts subcommittee chairs to educate clubs on Rotary's Endowment, including the opportunity for clubs to be recognized as a [100% Rotary's Promise Club](#)

### **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 2023, 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 gift prospects who are 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, EPNC, and other assistants). You work with the other members of your team to support district leaders.

You are appointed for a one-year term and can serve no more than three terms to ensure maximum effectiveness in the districts you serve. Because of the time-intensive nature of this role, you should not serve concurrently in other significant regional or district-level roles.

### **Assistant RRFCs**

Per The Rotary Foundation Code of Policies (24.020.6.), 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, EPNC, and assistants — 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 oversees the budget and keeps you informed of funding availability.

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

- Only confirmed assistants are eligible for funded travel or expense reimbursement through RI. If your nomination isn't confirmed before your regional team training, you may not be reimbursed for travel or expenses related to the event. For more on the assistant coordinator selection process, please see section 2, Key Relationships.
- Inform your regional leader of your travel plans and any required expenses in advance so they can determine if funding is available to cover the costs.
- Clearly indicate your role and your staff specialist when you submit travel requests and expense reports. 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 person 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 final cost of all flights and approved expenses so they can track the budget accordingly.

## **2. KEY RELATIONSHIPS**

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Rotary's regional leaders — the RRFC, RC, RPIC, E/MGA, and EPNC — 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, 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, E/MGAs, and EPNCs. The RI president appoints RCs and RPICs. RI directors and Foundation trustees 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 assigned trustee.

#### **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 (20.040.).

## **Other Regional Leaders**

The regional leader team — the RRFC, RC, RPIC, E/MGA, and EPNC — supports the priorities of Rotary's Action 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
- Streamline communication with district leaders to facilitate stronger collaboration
- 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. This will allow you to build on the progress that your predecessor has made and prepare for challenges as you develop 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 2 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 staff partner and district leaders. EPNCs work directly with district leaders and fellow regional leaders.

### **Assistant selection**

RRFCs, RCs, and RPICs select their assistants, in consultation with their director and assigned trustee. Assistants are appointed annually, and can serve no more than three years in a single role. Assistants 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 assistants. This form must be completed at least two months before any regional team training your assistants are expected to attend, regardless of whether it is held in person or virtually. 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 before they

can 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

You are encouraged to consider selecting qualified Rotaractors to serve as assistant coordinators to bring new ideas and a fresh perspective to your teams. Also think about how your team can model Rotary's commitment to creating a diverse, equitable, and inclusive environment in which members from underrepresented backgrounds have greater opportunities to participate as leaders.

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 training to ensure enough 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 the regional leaders and assistants in the region.
- Clearly communicate the budget and funding expectations to your assistants.
- 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 Action Plan. You serve as motivators and consultants year-round and as trainers at Rotary institutes, GETS, GNTS, 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. Although you may spend more time day to day working with the district committee chairs, developing a good working relationship with the governors 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 leaders 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-nominee and 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 train district committee chairs, and make sure that you have a shared understanding of how you'll work with those chairs.
- E/MGAs may work with district governors at different stages of the four-step process for major gift prospects. 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. You will likely work most closely with the committee chairs in charge of your areas of expertise in the districts. Because of this, it is important to build a relationship 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 district 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.

Here are some of the committee chairs and others you might work with:

RRFC	District Rotary Foundation chair District grants subcommittee chair District alumni chair District international service chair District trainer
RC	District membership chair District community service chair

	District international service chair District Rotaract chair District Rotaract representative District trainer
RPIC	District public image chair District trainer
E/MGA	District Rotary Foundation chair District endowment/major gifts subcommittee chair

### 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 the Foundation's programs to meet their service and fundraising goals. They also encourage participation in Rotary's programs to engage members and make a larger impact with grants.
- RCs assist Rotarians in engaging participants and attracting new members to develop vibrant clubs and meet their membership goals. They also encourage participation in Rotary's programs to engage members and help clubs make a bigger impact.
- 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.

### Rotaractors

The Board and Trustees encourage regional leaders to engage Rotaractors in training, fundraising, member development, and promotion. Here are some ways you can reach Rotaractors:

- Appoint Rotaractors as assistant RRFCs, RCs, or RPICs.
- Invite Rotaractors to present at or attend your training meetings.
- As you work to increase your region's giving to The Rotary Foundation, promote the Rotaract Giving Certificate. If five members of a Rotaract club contribute a total of \$50 or more, the club earns the certificate.
- Encourage districts to include Rotaractors in discussions about forming new clubs.
- Encourage district leaders to consider Rotaractors when nominating members for RI Awards.

## *Regional Leader's Manual*

- When you're collecting People of Action stories, ask Rotaractors about their service efforts, encourage them to nominate their projects for the Rotaract Outstanding Project Award.
- Find out if there is a [multidistrict information organization \(MDIO\)](#) that overlaps with your region and collaborate with it to achieve your goals.
- Stay up-to-date on [recent Rotaract policy changes](#).

## **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 Rotary's goals and Action 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 a Plan**

To reach your goals, you'll be asked to create a plan with measurable targets and monitor your progress toward it throughout the year. Both your 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 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 plan that best supports your region's needs.

Consider looking at information in My Rotary reports or in Rotary Club Central 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 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.

A 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 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.

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-evaluation 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 Progress Reports folder on the Regional Leaders Workgroup).
- Work with your assistants before completing the report to gather necessary information.
- 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 (look in the Endowment and Major Gifts folder under Resources).

## 4. TRAINING

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Incoming RRFs, RCs, RPICs, and E/MGAs prepare for their roles by participating in a training institute, which may be held virtually, in-person, or both. The training event gives 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.

Consider taking courses under the Training category in the Learning Center to boost your knowledge and skills and review previous training curriculum in the Curriculum folder on the Regional Leaders Workgroup.

### **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 GNTS, GETS, Rotary institute, or other key regional events, such as the district membership chair training or regional Rotary Foundation seminar. If the content

duplicates GNTS or GETS curriculum, don't invite governors-nominee or governors-elect to the 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.
- Recommend Learning Center courses on relevant topics as before or after the training.

## **GETS, GNTS, and Rotary Institutes**

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

During the training seminars, look for opportunities to introduce yourself to district governors-elect, governors-nominee, 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 cover at GETS and GNTS:

- RRFCs: The Rotary Foundation, grants, DDF, and fundraising initiatives
- RCs: supporting and developing clubs, participant attraction and engagement, strategic planning, and Rotary service activities and programs
- RPICs: public image strategies and campaigns, storytelling and brand promotion, and communication

RRFCs, RCs, and RPICs should work with the institute convener and GNTS and GETS team leaders to clarify your specific responsibilities and roles at GNTS, 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 invited by the institute convener to present or train participants at GNTS or GETS. Take advantage of attending the institute or training seminars to promote major gifts, cultivate current and potential Major Donors, and participate in informal discussions and formal training.

If you're not a trainer but will attend, use your time 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.

## **PETS and District Events**

Presidents-elect Training Seminars (PETS) and other district events, including the [District Vibrant Club Workshop](#), are a great way to meet club officers. Make sure to collaborate with

district governors-elect when offering your support to clubs. You won't be able to attend every district event or PETS, so work with your assistants and regional team to coordinate which events you will attend and how you can offer alternate support for the training meetings you cannot attend. Your assistants may be best positioned to support district events. 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.

## **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. It is convened by the RI director who will oversee the regional team in the coming Rotary year. This event may include your full regional team — the RRFC, RC, RPIC, E/MGA, EPNC, and assistant coordinators — and the regional team from your paired zone. Discuss your training plans with your region's trustee and invite them to participate and share their expertise with your team.

This meeting is funded by the regional leaders' budgets. If an in-person meeting is too costly, host an online meeting or series of conference calls.

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 Regional Team Training Guide in the Publications folder on the Regional Leaders Workgroup to see a sample agenda and discussion questions.

## **Virtual Training**

You will likely not be able to visit every district in person or regularly meet face-to-face with your team. You'll need alternatives. Take the Conducting Online Training course in the [Learning Center](#) for ideas for changing in-person events to virtual ones.

Many regional leaders find that sharing a webinar license for the region is an effective way of working together on distance learning.

Check the [Learning Center](#) on My Rotary for online courses related to your areas of expertise. Then recommend them to members in your region before or after 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**

This newsletter is sent every other month to all regional leaders and assistants, as well as senior leaders. It has important updates, information about new resources, and success stories from the field.

### **RRFC, RC, RPIC, or E/MGA Facebook group**

These private Facebook groups allow you to collaborate with your fellow RRFCs, RCs, RPICs, or E/MGAs. Ask for comments on ideas, ask questions, and post photos, videos, or other content. If you aren't already a member, ask your staff specialist to add you to the group.

### **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 and click your name in the upper right corner to open the My Account menu. Choose My Account Actions. Under Rotary Workgroups, click View. On the Rotary Workgroups page, choose the Regional Leaders Workgroup.

### **Regional Leader Directory**

This directory presents an overview of all regional teams. Use it 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 a goals strategy 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 reports, dashboards, and information on clubs' goal setting and achievement. 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 ways to communicate with Rotarians in your region. Typical channels of communication include email, phone, social media, online meeting platforms, and text messaging or chat apps, but others 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 and Regional Leader Insider.

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.

### **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.

### **Learning topics**

Learning topics in the Learning Center are a great way to share new ideas and useful resources with other members. Check the topics for tools and links that can help you and your region.

## **Data Privacy**

Review Rotary's [Privacy Policy](#) and [what you need to know about data protection rules](#) to make sure you're complying with these regulations. Take the [Protecting Personal Data](#) course in the Learning Center to understand how to protect the personal data you have access to in reports.

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 in early 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, and other relevant information. Mileage reimbursement rates can be found on your Regional Leaders Workgroup.

#### 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 to you and your assistants if 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**

In 2021, you'll submit your expenses online, using Rotary's expense report tool. Reports are due within 60 days from 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. Note your regional leader role and the assignment on your report. Use a separate expense report for each assignment or trip. Refer to the [Travel & Expenses page](#) for more details.

## **Tips and reminders**

### Travel:

- Review the [Travel & Expenses page](#) on My Rotary before you submit your travel request to make sure you are following the current process.
- Book all air travel through Rotary International Travel Service (RITS). Local purchase of airfare is discouraged and will be authorized only if the fare is at least \$300 lower than the airfare from RITS.
- Regional leaders can't review and approve their assistants' travel requests after they are submitted to RI. Please ask your assistants to discuss their travel plans with you in advance so you can include that information in your budget tracking.

### Expenses:

- Plan your budget for the whole year.
- Check receipt images for clarity. 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.
- Regional leaders can't review and approve their assistants' expense reports after they are submitted to RI. Please ask your assistants to discuss their expenses with you in advance so you can determine whether you can fund it and you can include those costs in your budget tracking.

## **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.

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 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 LEADER'S 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>• Communicate with district leaders.</li> <li>• Monitor Foundation, membership, and public image trends.</li> <li>• Promote recognition opportunities as a member engagement strategy.</li> </ul>
<b>July</b>	<ul style="list-style-type: none"> <li>• <b>Submit your Goals Strategy Form.</b> Your staff specialist will send a link to the form.</li> <li>• Receive confirmation of your 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: Choose 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>• E/MGAs: Work with your staff partner or specialist to plan how you'll cycle donors through the four-step process.</li> <li>• RCs: Congratulate clubs that earned the Rotary Citation.</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> <li>• Staff announces regional leaders appointments.</li> <li>• Third-year regional leaders: Contact your successor to begin preparing them for the role.</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 if appropriate.</li> <li>• RRFCs, RCs, RPICs, and E/MGAs: Serve as a training team member at GETS, GNTS, and the Rotary institute if the convener invites you to.</li> <li>• E/MGAs: Hold a donor recognition activity in conjunction with a</li> </ul>

	Rotary institute. Plan accordingly for regional Arch Klumph Society inductions.
<b>September</b>	<ul style="list-style-type: none"> <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> <li>• RCs: Encourage districts to follow up with clubs that completed the <a href="#">Club Planning Assistant</a> last Rotary year and to ask about their progress toward recommended actions.</li> <li>• Submit nominations for the Rotary Alumni Global Service Award and Rotary Alumni Association of the Year award by 15 September.</li> </ul>
<b>October</b>	<ul style="list-style-type: none"> <li>• <b>Complete your 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 prospective donors who are interested in the cause.</li> </ul> </li> <li>• Celebrate Reconnect Week             <ul style="list-style-type: none"> <li>○ RRFCs and 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> <li>• RRFCs and E/MGAs: Encourage districts to begin planning for Rotary Foundation Month, in November. Begin promoting year-end gifts.</li> <li>• RCs: Encourage district governors to submit a <a href="#">nomination</a> for the Service Above Self Award.</li> </ul>
<b>November</b>	<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.</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> <li>• RRFCs: Encourage district Rotary Foundation chairs to submit <a href="#">nominations</a> for the Rotary Foundation Citation for Meritorious Service (November-December).</li> </ul>
<b>December</b>	<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>

<b>January</b>	<ul style="list-style-type: none"> <li>• <b>Complete your regional leader evaluation.</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> <li>• Encourage Rotaractors to submit projects for the Rotaract Outstanding Project Award.</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> </ul>
<b>March</b>	<ul style="list-style-type: none"> <li>• RCs: Celebrate the success and importance of Rotaract during World Rotaract Week.</li> </ul>
<b>March-April</b>	<ul style="list-style-type: none"> <li>• Incoming RRFCs, RCs, RPICs, and E/MGAs participate in a training institute.</li> <li>• Second-year regional leaders: Complete the form to recommend candidates to be your successor. Staff will send you a link to the form.</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>• 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 goals strategy. .</li> <li>• Conduct training for incoming committee chairs, if applicable.</li> <li>• Plan for GETS, GNTS, regional seminars, donor recognition events, or any other meetings held in conjunction with the Rotary institute.</li> </ul>
<b>May-June</b>	<ul style="list-style-type: none"> <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> <li>• RCs: Encourage districts to ask clubs to complete the <a href="#">Club Planning Assistant</a>.</li> <li>• RRFCs, RCs, and RPICs: Introduce your assistant coordinators to next year's district leaders.</li> </ul>
<b>June</b>	<ul style="list-style-type: none"> <li>• <b>Complete your year-end report.</b> Your staff specialist will send a link to the form.</li> <li>• Submit your year-end expense reports by the due date.</li> <li>• RRFCs, RCs, and RPICs: Encourage club leaders to report achievement of their goals in Rotary Club Central to be eligible for the Rotary Citation.</li> </ul>

	<ul style="list-style-type: none"><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>
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## APPENDIX 2: SUCCESSION PLANNING GUIDE

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 about.</li> <li>• 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> <li>• Explain how you use Rotary reports and resources (such as Rotary Showcase, the Learning Center, and the Brand Center).</li> </ul>

	<ul style="list-style-type: none"><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 goals strategy. Advise your successor on setting targets and developing 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 help planning your transition, contact your staff specialist.



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