

Great Lakes Rotary PEELS

March 19-21, 2026

Participant Workbook

Rotary International
Districts 6290, 6310, 6330, 6360, 6380, 6400, 6540



Welcome and congratulations to all of you who will be serving in leadership roles with your clubs and districts during the 2026-2027 year!

We come together as Rotarians during this Great Lakes PELS Conference to prepare for your year as a leader in your club. The Presidents-Elect and their club members are the true champions of Rotary and the people who will help to do good in their communities and throughout the world. This is what gives the Great Lakes PELS Committee the fuel it needs to put together a fantastic program for you.

The District Governors-Elect and the entire Great Lakes Rotary PELS Committee want to make this the best experience for you - and one that you will always remember. Throughout the next few days, if there is anything we can do for you please do not hesitate to ask.

We hope you will immerse yourself in the opportunity you have to network with seven different Districts in our area. Be sure to learn and share with one another. This is how you will get the most out of this weekend.

Thank you for letting me and our team be the caretakers of this event. We all hope you have a great time and prepare to be inspired!

Sue

PDG Sue Goldsen
Great Lakes Rotary PELS Chair
Rotary Club of Passport to Service
District 6400

Great Lakes Rotary PELS
is honored to welcome
Olayinka Hakeem Babalola
President
Rotary International
2026-2027

Yinka is a proud member of the
Rotary Club of Trans Amadi, Nigeria.



**Great Lakes Rotary PELS 2026
Participant Workbook
Table of Contents**

Thursday Pre-Conference Sessions

• ClubRunner Essentials	4
• DACDB Essentials	5
• Back Again? Encore Presidents	6
• AG Chat	7
• Successful Fundraising and Service Projects	8
• Leading Change With Confidence	9
• Planning for Success: The Power of a Club Calendar	10

Friday Sessions - Each President Elect to attend all of these Learning Sessions

• Learning Session 1 Planning the Year Ahead/Preparing to Lead	12
• Learning Session 2 Managing Your Club/Conducting Meetings	17
• Learning Session 3 Engaging Club Members/Attracting New Members	20

Friday Breakout Sessions - Choose one each time period, two total

• Topic 1 The Rotary Foundation Doing Good in the World	24
• Topic 2 New Club Creation	25
• Topic 3 Building Rotary Youth Programs	28
• Topic 4 Promoting Rotary and Telling Your Rotary/Rotaract Story	30
• Topic 5 Turning Rotary Vision into Action	32

Resources	34
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CODE TO GET THE
CONFERENCE APP!**



PRE-CONFERENCE SESSIONS

Club Runner Essentials

Facilitator: Mickey Dutta

ClubRunner Nova is the newest and most ambitious upgrade to ClubRunner that's ever been done. This session will explore what Nova is, why it's so important, how your club can upgrade, and will be followed by a Q&A session. With a new, streamlined interface, faster infrastructure and brand new features, Nova is the next exciting evolution of ClubRunner.

To learn more please visit: clubrunner.com/nova

Discover What's New in ClubRunner!

Email AI Assistant

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Membership Management

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Custom Reports

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Event Registrations

And so much more!

Notes

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PRE-CONFERENCE SESSIONS

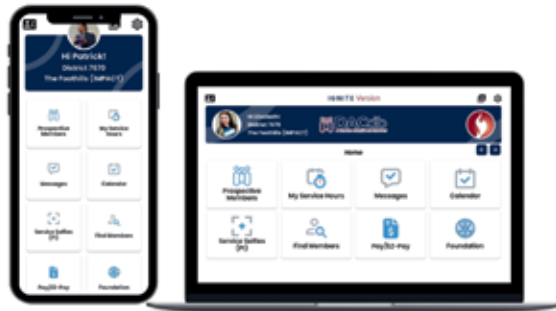
DACDB Essentials

Facilitator: DG Patrick Longano



What are the **TOP FIVE** things **YOU** need for your **PRESIDENTIAL** year?

Come to our session and let us help you plan your success.



Special Tools to Grow Your Club



PRE-CONFERENCE SESSIONS

Back Again? Encore President

Facilitator PDG Bruce Goldsen So, You're Back Again?? What a Great Opportunity! In this session, you will participate in interactive discussions as to how and why you became a multi-year president. You will explore and share resulting insights and discuss the numerous opportunities available with other returning club presidents. Discuss how you plan to do things differently this time around. Embrace change, encourage, prepare, and support club members.

Key Outcomes

1. Explore the Value & Opportunity of YOUR Return
2. Discuss the Change Process
3. Your Experiences – Advance Club Planning

What are some reasons holding a club back from planning?

What are some of the "adjectives" associated with a Vibrant Club?

Activity: Changing Club Culture

In your assigned group pick 3 of the above attributes of a Vibrant Club, discuss how you could help your club to attain these attributes.

PRE-CONFERENCE SESSIONS

AG's! Let's have a chat! What's on your mind?

Facilitator DG Paul Wiese Serving as or preparing to serve as an Assistant Governor? Join the Assistant Governor Forum at GLPETS to discuss top challenges—membership, communication, engagement, and more. Connect with peers from 7 districts, share best practices, and gain resources to strengthen your clubs and district leadership.

How do you as AG's help clubs with the Action Plan:

Impact: How can we do more good in the world — good that changes lives?

Reach: How can we attract more people to Rotary? How can we involve those who are not yet working with us?

Engagement: How do we make our organization welcoming to all and worth people's time?

Increase our ability to adapt: How can you help Rotary adapt more quickly to a changing world?

Impact: _____

Reach: _____

Engagement: _____

Adaptation: _____

Responsibilities of an AG

Concerns and obstacles = Solutions

Tips for Success

PRE-CONFERENCE SESSIONS

Successful Fundraising and Service Projects

DG Mark Andresky will facilitate this important session. This is important for every club. Come share creative ways to keep the “Fun” in Fundraising, & pick up some great new ideas! Service projects and giving back to our communities both locally & globally; it’s why we became Rotarians. Let’s share some great Service project ideas!


Examples of Successful Fundraisers



How do fundraisers benefit the club and community?



Successful service projects (local and global)



PRE-CONFERENCE SESSIONS

Leading Change With Confidence: Building a Stronger Rotary Club

Facilitator DGN Therese Maggioncalda. Change is a constant in Rotary and in life. Rotary clubs are full of passionate, service-minded leaders—but that doesn't mean change is easy. Whether it's new leadership, evolving member needs, or shifts in priorities, how your club responds to change can determine its success. This session will explore practical strategies to embrace change positively, engage members during transitions, and create a culture of adaptability that strengthens your club for the future.

What the club should address to become stronger - what change do you know should take place?

Why Change Feels Hard

Humans naturally prefer the familiar.

In Rotary, traditions are strong—this is a strength and a challenge – how?

Most resistance is not to the change itself but to uncertainty, loss of control, or fear of doing it wrong.

The "Rotary Change Cycle" (10 mins)

Present the simplified model:

1. Awareness – Members hear about the issue or opportunity.
2. Understanding – Members explore what this means for the club.
3. Alignment – Members see how the change supports club goals.
4. Action – The club implements steps with clarity.
5. Adjustment – The club refines and strengthens the changes.

Strategies for Leading Change

A. Communicate Clearly and Often

- Share the "why," not just the "what."
- Use short updates at each meeting.
- Avoid surprises.

B. Involve Members Early

- Host listening sessions.
- Create a short survey.
- Ask: "What concerns you most?" and "What excites you most?"

C. Start Small With Pilots

- Try a new meeting format for 60 days.
- Pilot a new service project before adopting it permanently.

D. Build Champions

- Identify 3–5 members who are positive and respected—ask them to endorse or help shape the change.

E. Celebrate Quick Wins

- People need evidence that the change is working.

Activity: Role Play Scenarios: Identify potential resistance. Apply the Rotary Change Cycle to plan an approach. Share one takeaway with the full group (5 minutes).

PRE-CONFERENCE SESSIONS

Planning for Success: The Power of a Club Calendar

Join co-facilitators PDG Holli Seabury and DGE Lorna Gunning-Fratschko.

By the end of the session, participants will be able to:

- Explain how a well-structured annual planning calendar supports organizational efficiency, member engagement, and alignment with Rotary priorities.
- Participants will learn practical strategies for mapping club activities to Rotary’s monthly themes, and core priorities, ensuring that events and initiatives contribute to long-term impact.
- Participants will be able to identify and implement methods for managing time effectively and keeping members informed and motivated throughout the year using the planning calendar as a central tool.

Planning your Rotary year in advance is the best way to ensure you meet your goals and have a successful (and less stressful) year!

After PELS, set a meeting of key club members to review the current year calendar and put activities on next year’s calendar. Include regularly scheduled board meetings, dates for fundraisers/service projects and the planning meetings leading up to them, membership recruitment events, socials, etc.

The goals you set in Rotary Club Central should also guide your calendar planning. Having these goals around Enhancing Participant Engagement, Increasing our Impact, Increasing our Reach, and Increasing our Ability to Adapt set before you do your calendar planning will help guide your planning.

Don’t forget to assign a person or committee responsibility for each activity.

Who from your club should be at your planning meeting?

Rotary Themes by Month

July	Maternal and Child Health
August	Membership & New Club Development
September	Basic Education and Literacy
October	Community Economic Development
November	Rotary Foundation
January	Vocational Service
February	Peacebuilding and Conflict Prevention
March	Water, Sanitation, and Hygiene
April	Environment
May	Youth Service
June	Rotary Fellowships

PRE-CONFERENCE SESSIONS

Using May: Youth Service Month brainstorm ideas for activities to add to your calendar to meet the goals you have set. Use the Rotary Club Central priority goals (starred) to guide your planning.

Service Project Idea: Epic Day of Service! May 16, 2026

Membership attraction tie-in:

Fundraising tie-in:

Program idea:

Social media/PR idea:

Learning objectives

After this session, participants will be able to:

- Identify their club's strengths and weaknesses
- Set goals that align with Rotary's Action Plan
- Identify the skills needed to be an effective club leader
- Analyze challenges in leading the club and develop strategies for handling them

Your Facilitators:

The four priorities of our **Action Plan** are:

1. **INCREASE OUR IMPACT**
2. **EXPAND OUR REACH**
3. **ENHANCE PARTICIPANT ENGAGEMENT**
4. **INCREASE OUR ABILITY TO ADAPT**

How can we do more good in the world — good that changes lives?

Activity #1

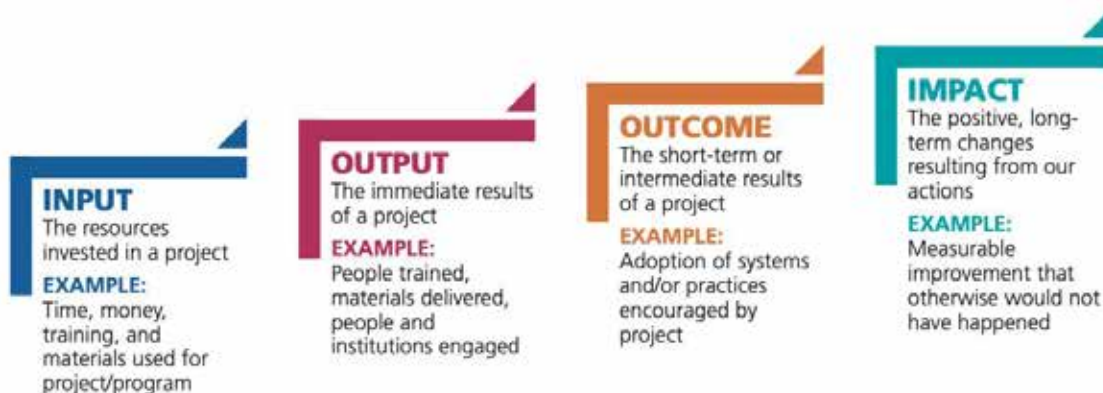
Select one of these

1. Little Free Libraries around your community
2. Stocking and delivering food at a local pantry.
3. Ramp for a home for a Senior Citizen
4. Planting new trees and pollinator gardens.



Inputs / Outputs / Outcomes / Impact:

ROTARY'S IMPACT BUILDING BLOCKS



The ROTARY ACTION PLAN



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. **The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.** To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the coming years.

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

2. EXPAND OUR REACH

How can we attract more people to Rotary? How can we involve those who are not yet working with us?

Question: Where in your community can you find partners that share your goals, match your needs and may be interested in what your club can offer? As you work with community partners, what is a Rotary “story” you will share?

3. ENHANCE PARTICIPANT ENGAGEMENT

How do we make our organization welcoming to all and worth people’s time?

As a president, what are two things that you can do to enhance participant engagement?/ How will you know if the changes helped?

4. INCREASE OUR ABILITY TO ADAPT

How can you help Rotary adapt more quickly to a changing world?

How can you bring in new perspectives to strengthen Rotary and help prepare for change?

PREPARING TO LEAD

What kinds of tasks should you be taking care of now as you prepare to lead?

Activity #1: Attributes of Successful Clubs

In your assigned group discuss attributes of a successful Rotary Club. Make special note of the 3-5 most important attributes in your notes.

Does your club have a strategic plan? Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction.

<file:///Users/user/Downloads/strategic-planning-guide-en.pdf>

What are the best practices for setting annual goals?

You're also responsible for overseeing the work of all club officers to help them reach their goals for the year. The following club committees are recommended:

Rotary clubs

- Administration
- Membership
- Public Image
- Rotary Foundation
- Service Projects

Rotaract Clubs:

- Club
- Community Service
- Finance
- Rotary Foundation
- International Service
- Professional development

Selecting Club Officers: Everyone has the ability to become a great leader. Here are some tips for selecting club officers:

1. **Understand your members interests.** Get to know your members and find out what their professional abilities are, personal interests, and talents are.
2. **Ensure Continuity.** Because committee activities may carry over from one year to next, you may choose to make multiyear appointments or reappoint some members.
3. **Mix it up!** Have a variety of members serve in leadership roles is important to you club's success.
4. **Be clear and open to ideas.** Be sure to explain the role and responsibilities, and provide space to hear how your members would envision this role.

Preparing club officers

Here are some ways to prepare club officers for their roles:

- Give them a job description for their position that clearly outlines their responsibilities
- Encourage them to take online training specific to their role on the Learning Center
- Encourage them to attend the district training assembly to learn more about their role and work together as a leadership team
- Recommend that they meet with their predecessor

Your leadership strategy

What will your leadership strategy be? As a president, you may approach leadership differently depending on the situation. Consider the following when working with your team:

- Environment and culture
- Your approach to problem solving
- How decisions will be made
- Strategies for setting and carrying out goals
- Approaches to cultivating new leaders
- How you'll delegate responsibilities
- How you'll monitor progress toward goals
- How you'll keep your team motivated

As a Club President how will you set up your club structure and culture to be the most successful? How will you work to make sure the club is meeting the needs of your members? What do you need to plan for during your year as President? What will your club meetings look like? How will you make board meetings successful and fun?

Friday Session 2 | Managing Your Club/Conducting Meetings

Learning Objectives

- Describe the club president's responsibilities related to club administration, finances, and amending club bylaws. Rotary's requirements for a functioning club.
- Discuss ideas for meeting formats that will keep members engaged.
- Identify ways to improve the meeting experience for members

Your Facilitators:

Resources | See page 34

Managing your Club Key things you do as a president:

Activity #1

What is a functioning club? List the features of a functioning club.
What are Rotary's Expectations and Requirements of a "Functioning" Club?

Work on your own, think about these items

- What are your personal goals for managing your club?
- What is one area of your club operations that you'd like to improve?
- How will you evaluate the success of your club's operations?

Conducting Meetings

Why do you think having good meetings is important? List reasons.

Take these questions back to your club and ask yourself/board/members and discuss

- Has your club varied its meeting format and frequency?
- Are your meetings well attended? If not, why not?
- What would motivate members to attend more meetings?
- How does your club gather opinions about the format and content of your meetings?
- Do you consider diverse perspectives when you make decisions about the meeting experience?
- What practices can your club put into place to ensure that guests are welcomed and have a positive experience?
- Is your club welcoming and accessible to families with young children, people with disabilities, and people whose schedules don't allow them to attend regularly?
- What are other ways members could participate in club meetings?
- How could your meetings and board meetings be improved?

Activity | Work together in your group:

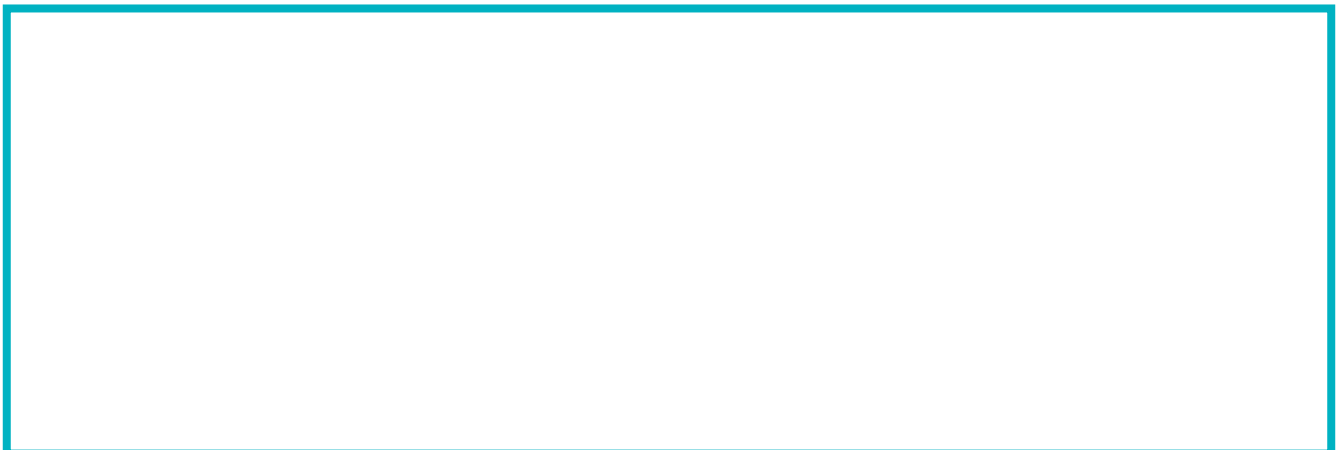
Consider how to make meeting formats or programming more engaging and accommodating for members. Let's generate ideas for different meeting formats or innovative meetings that you may know from your own club, other organizations, or workplaces. Be sure to keep in mind the needs of other members as you do this.



What will your Club meetings look like? Do on your own



Month-by-Month, what are some possible specific activities for your club? Add thoughts about who benefits and who needs to be involved.



Learning Objectives

After this session, participants will be able to:

- Involve members in ways that make them feel valued for the unique skills they bring
- Create strategies to engage members
- Identify areas of their club they need to focus on to create an inclusive environment
- Develop strategies to attract new and diverse members

Your Facilitators:

Resources | See page 38

ENGAGING CLUB MEMBERS

Key things you do as a president:

Questions to consider:

- Do you ask longtime and new members what they want from their club experience? What process could you implement to ensure this is done regularly?
- How do you keep your members informed and involved in decision making? Involving members in discussions and keeping them informed fosters a sense of belonging and inclusion.
- Do your club activities reflect the interests of your members, or merely what has been done for many years?
- How can your club be more flexible in order to accommodate members' needs?
- Are your meeting and event locations accessible to those with vision, hearing, cognitive, and physical impairments?
- Does your club offer opportunities for members to speak up if they see or experience something inappropriate?
- What does your club do to recognize members for their efforts?

Activity | Select one of these

1. Encourage member engagement

- Brainstorm ways to engage members
- How can you share these opportunities with members?
- What are some challenges to engagement, and how can you overcome them?



2. Improve your club's engagement efforts

The Rotary Club of Yula has 39 members. The club has a strong core group of 15 members who keep rotating through the leadership positions. Over the past year, the other club members have not participated much and have started to leave. The incoming club president noticed that many members are not attending meetings. After reviewing the membership reports, they found that the club had 54 members three years ago and has lost members each year. They know they need to address the declining membership.

- What's the first thing you would do to address this issue?
- What other steps would you take?
- What changes would you make after looking into this issue?
- What steps would you take to make these changes?
- How would you handle members who don't agree with the changes?
- How does this apply to changes needed in your own club?



ATTRACTING NEW MEMBERS

What do you think the key points are for attracting new members to your club?

Questions to consider back at home in your club:
(maybe this is a board meeting exercise)

- What are the benefits of being a member?
- What attracts prospective members to your club?
- What groups are you not attracting to your club?
- How can you make your club more inclusive so that it appeals to new members?
- If you were joining Rotary today, would you join your club?
- How does your community's demographic information compare with the demographics of your club?
- Does your club consider prospective members from underrepresented groups for membership?
- How would you describe the diversity of your club based on gender, age, ethnicity, ability, and profession? How could you make it more diverse?
- Who should your club's membership include in three to five years?
- How can you bring in different types of people as members and as leaders so that your club reflects the community?
- How can you use direct marketing, print media, and social media to attract members?
- Has your club made significant changes to any traditional practices that were unattractive to guests and prospective members?
- What does your club do with its online membership leads?
- How do you evaluate prospective members?
- How do you recognize members who bring in new members?



Activity | Assess your readiness to create a more diverse club

DIVERSIFYING YOUR CLUB: A READINESS ASSESSMENT

Clubs vary widely in their readiness to build connections with new people and create a culture of inclusion. Complete the table below, using the empty row to add your own ideas. Discuss the steps you would take as a group.

IS YOUR CLUB READY TO...	YES/NO	NEXT STEPS
Discuss the benefits of having its membership accurately represent your community?		
Dedicate time during a few meetings to conduct the Diversifying Your Club assessment and complete the Member Diversity Worksheet?		
Recognize the difference between equality and equity, and understand why equity is our goal?		
Understand and counteract the ways in which unconscious biases can shape how we perceive people?		
Build authentic relationships with diverse groups of people?		
Include members of underrepresented groups in any discussion of community needs and give them an active role in any initiative?		
Develop a culture of inclusion where everyone who engages with us feels respected and valued for their unique qualities?		



Breakout 1 | The Rotary Foundation Doing Good in the World

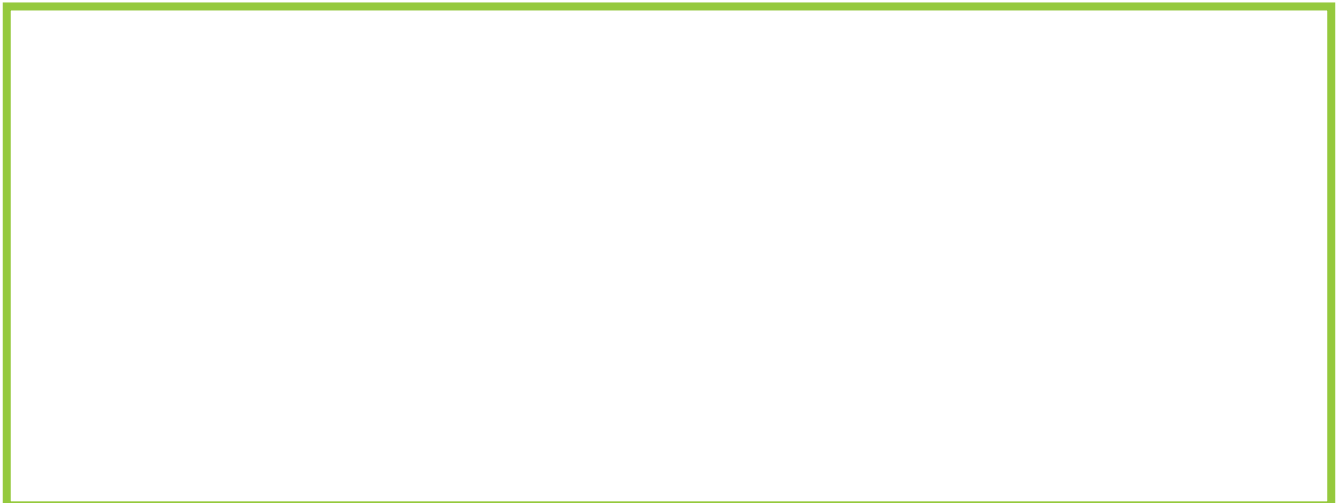
Facilitators Nathan Triplett, ARRFC and Edina Mehovic, Senior Annual Giving Officer

Overview: Not simply a review of The Rotary Foundation and how it works, but rather a discussion of how you as the President can help your club understand the true value and impact of our Foundation. This includes both helping your members understand the purpose and options for donating to the foundation as well as helping your club take advantage of any opportunities for grants or other Foundation support.

Ways to give to The Rotary Foundation



What programs are available to help clubs Do Good in the World?



In your group compile a list of "tips" – best practices for your club to have a strong focus on The Rotary Foundation.



Breakout 2 | New Club Creation - This is Vital for Rotary

Facilitators: DG Patrick Longano and PDG Cindie Kish

Learn how to grow, engage and retain members of YOUR club through companion clubs, club refreshes, Discover Rotary, and more.

Companion Club	
IMPACT Club	
Satellite Club	
Standalone Club	
Rotaract Club	
Interact Club	

Visit us at www.clubcreationteam.org, or get the app with your device.

Android



iOS

Club Brainstorming

<p>Q1: Describe your existing club.</p>	
<p>Q2: Are you losing members? Why?</p>	
<p>Q3: Are you struggling to attract new members? Why?</p>	
<p>Q4: What are your ideas to improve the attraction and attrition rates for your club?</p>	
<p>Q5. Let's say you wanted to start a new club. It could be a companion club, a satellite club, a standalone Rotary or Rotaract club, etc. If you had a magic wand, what would you create for a new club?</p>	
<p>Q6. What would this model look like?</p>	
<p>Q7. How many people do you believe this would appeal to?</p>	
<p>Q8. What do the demographics of the club look like?</p>	

Barriers Brainstorming

Q1. When looking at increasing membership or starting a new club, what are some barriers you're going to face?

Q2. What do you do when there are those that push back against all of your new ideas and proposed ways to reach the goals of membership growth (including the creation of new clubs)?

Bucketing

Next Steps

Breakout 3 | Building Rotary Youth Programs

Facilitators: DG Brent Sheppard, PDG Traci Sincock

Learning Objectives

- Understand the value of sponsoring all four Rotary Youth Programs - Interact Club, Rotary Student Program, RYLA and Rotary Youth Exchange.
- Identify strategies to communicate and work with students.
- Attract parents to participate and join the Rotary family.

Resources | See page 34

PROGRAM/ACTIVITY	WHAT QUESTIONS DO YOU HAVE? Take 3 minutes to write down your questions
<p>Interact Club Rotary sponsored club that teaches leadership skills and provides opportunities for community and international service. Time: school year (ages 12-18, middle school and high school)</p>	
<p>Rotary Student Program Rotary sponsored program (Long and short-term Youth Exchange and Interact) that aligns students with professionals in dream careers. In reverse interview settings, students confirm or redirect dreams before leaving high school. (ages 15-19, high school)</p>	
<p>Rotary Youth Leadership Awards Rotary sponsored camp for developing leadership skills, public speaking and team building. Time: 2-3 day weekend (middle school & High School, ages 14-19)</p>	

WHY and **HOW** should we participate in these programs?

How can you promote youth programs within your schools?

What impact or advantages will these programs have on your club and membership?

How can we involve parents/guardians in participating in youth programs and joining Rotary?

TOP REASONS WHY STUDENTS SHOULD PARTICIPATE IN ROTARY YOUTH PROGRAMS

- Leadership-building
- Connect with community needs and give back
- Build a strong resume, achieving high school and state graduation requirements
- Achieve 10 extracurriculars of the College Common App. This section is how colleges can get to know more about the student. It can show what makes the student unique: pursuits, interests, and passions - activities that can best tell the story about the character of the applicant.
- Develop career skills and areas of interest
- Career mentoring by confirming or redirecting dreams before graduating from high school.

Breakout 4 | Promoting Rotary and Telling Your Rotary/Rotaract Story

Facilitators: Amy Sheller and Keith Hodkinson

Why is it important to improve Rotary's public image?

How can you help your club build a strong public image in your community:

Elements of an engaging People of Action story

1. Focus on relevant community challenges

Show how you got involved and worked on a challenge that people in your community care about — homelessness, for example. Use information from your community assessment and project evaluation to demonstrate how you helped your community.

2. Describe the action you took

Explain the major ways in which your club or district intervened to address the issue. In this example, Rotary members constructed a cluster of very small houses to reduce homelessness in their community.

3. Show collaborations or partnerships

Demonstrate the strength of your club's connection to the community and its ability to achieve results by showing how you work with other local organizations.

4. Include the beneficiaries

Show the people or organizations that are affected by what your club does in order to emphasize the life-changing results that Rotary projects can have.

5. Illustrate the positive impact on the community

Describe the difference you made in the community to create an emotional connection to your story and to your club.

ACTIVITY

TELLING YOUR PEOPLE OF ACTION STORY Imagine you've been contacted by a local news organization to explain Rotary's impact in the community. Consider the following questions to help you develop your People of Action story. What was the challenge or need? What action did Rotary take? Who joined as partners? Why is this important to the community? What was the impact? How could others get involved? (Call to Action) Take notes in the space provided. Then share your story with a group.

Scenario: "Clean Water Initiative"

Project Overview: The Riverside Rotary Club launched a "Clean Water Initiative" to install water filtration systems in local schools to ensure students have access to clean drinking water.

Goals: Raise awareness about water quality issues in the community. - Engage local businesses and residents in supporting the project. Encourage volunteer participation.

Execution:

- **Social Media Campaign:** The club created a series of posts on Facebook and Instagram showcasing the problem of water contamination, using infographics and testimonials from affected families.
- **Kick-off Event:** They held a community event to launch the project, inviting local leaders and media. During this event, they shared stories from families impacted by poor water quality and emphasized the importance of the project.

Partnerships: The club partnered with local businesses for sponsorships and donations, creating a "Sponsor a Filtration System" initiative where businesses could contribute directly.

Outcomes: The project funded the installation of filtration systems in five local schools, benefiting over 1,000 students. The social media campaign increased engagement, with posts reaching over 5,000 users and generating significant community discussion. Local businesses reported increased foot traffic and positive community sentiment due to their involvement.

A PUBLIC IMAGE TOOLBOX

A toolbox is a place you can go to and find just the right application to get something built or repaired. For a plumber, it may be a wrench. For an electrician, it could wire cutters or a voltmeter. For a club president, a public image toolbox would contain virtual tools like those described below. Feel free to make notes in the box below.

Contents:

- New Rotary Year Checklist
- New Club President Press Release
- How to do a Club Health Check
- How to work with local media
- How to use Google Alerts
- Talent and Interest Survey Form
- Rotary Resource QR Code Sheet
- Utilizing Artificial Intelligence (A.I.)

Breakout 5 | Turning Rotary Vision into Action

Facilitators DG Mark Andresky and PDG Holli Seabury

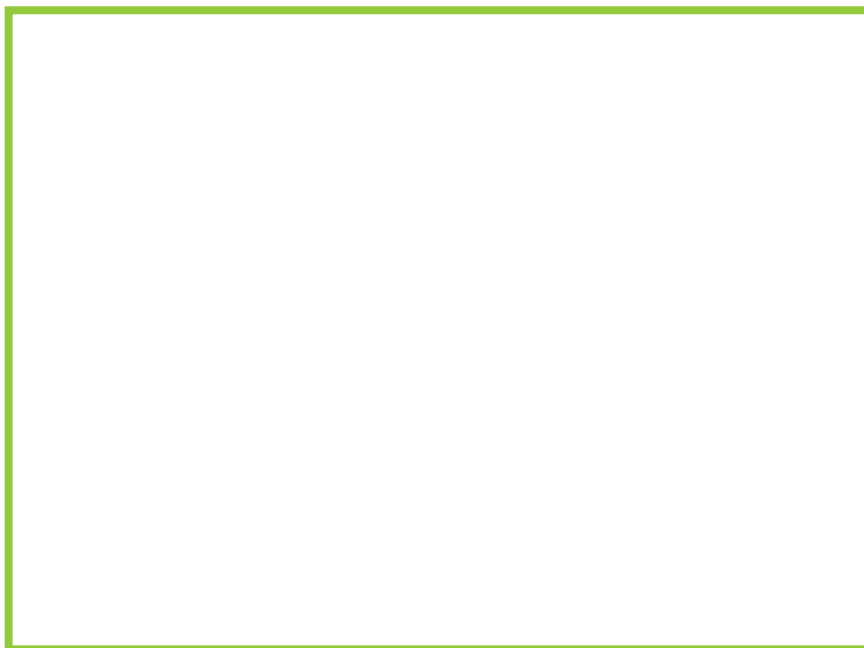
By the end of this session, participants will:

- Understand why long-term planning is critical to success
- Identify how the Rotary planning tools are interconnected
- Understand the steps to go from vision to action

Impact happens when vision --> plan --> action

A shared club vision, developed with member input, creates stronger buy-in and long-term momentum. The president's role is to implement the vision through the activities done during their year.

Who should you be working with from your club or community to turn your goals from your Action Plan and in Rotary Club Central into activities to achieve those goals?



From Vision to Action



Club Health Check Snapshot:
Rate your club using a 1 – 5 scale.
1: We are not doing very well 5: We rock!

___ Clear club identity ("Who are we?")

___ Member engagement & retention

___ Membership growth & diversity

___ Service impact & visibility

___ Leadership continuity

Large Group: Working with the goal for the lowest scoring category, what measurable actions can we take to achieve that goal? What is the timeframe?



Sample Increase our Impact Goal: Increase club membership by targeting underrepresented age groups, professions, or community sectors over the next 3 years.

Make it SMART: Increase Rotary Club membership by 20% within the next 3 years by recruiting at least 15 new members from underrepresented age groups (under 40), professions (such as technology, healthcare, and education), and community sectors (nonprofit leaders, small business owners). Achieve this by hosting 4 targeted outreach events annually, creating partnerships with at least 3 local organizations, and implementing a mentorship program for new members within 6 months of joining.

Turn it into action! Sample Activities Plan with Quarterly Milestones Year 1

Q1 - Form a Membership Growth Committee.

- Identify underrepresented groups (age <40, professions like tech, healthcare, education).
- Develop outreach strategy and marketing materials.
- Metric: Committee formed; outreach plan approved.

Q2 - Host first outreach event (e.g., networking mixer).

- Launch social media campaign highlighting diversity and benefits of Rotary.
- Begin partnership discussions with local nonprofits and businesses.
- Metric: 1 event completed; 2 partnership leads identified.

Q3 - Host second outreach event (community service project).

- Secure first partnership agreement.
- Recruit at least 3 new members from target groups.
- Metric: 3 new members; 1 partnership signed.

Q4 - Host third outreach event (professional development seminar).

- Develop mentorship program framework.
- Recruit additional 2 members.
- Metric: 5 total new members; mentorship program ready for launch.

Learning Center: go to rotary.org/learn, sign in to MyRotary, and accept the privacy policy to enable your access. Be sure to have a MyRotary Account. If you do not have one sign up here -> <https://my.rotary.org/en/signup>

Social Media

Brand Center

<https://brandcenter.rotary.org/en-us/>

Rotary's social media accounts

<https://www.rotary.org/en/news-features/social-media>

<https://www.facebook.com/help>

<https://help.instagram.com/>

Back Again? Encore Presidents

Strategic Planning Guide

How Can You Maintain a Positive Volunteer Culture During Change?

Cliff Dochterman: "If I Were Club President Again!"

Successful Fundraising

Easy Fundraising Ideas (Web)

Club Operations

Manual of Procedure

Recommended Rotary Club Bylaws

Rotary Code of Policies

Rotary International By-Laws

Planning your year ahead

Learning Center courses:

Rotary's Action Plan and You

Rotary Club Central Resources

Action Plan page on My Rotary

Rotary Citation page on My Rotary

Club Health Check PDF

Get Ready: Club President

Working With Your Club Leadership Team

Vibrant Clubs in Action

Club Excellence Award page on My Rotary

Strategic Planning Guide

Managing you Club and Conducting Meetings

Learning Center courses:

Managing Club Business

Rotary Club Central Resources

Best Practices for Engaging Members

Vibrant Clubs in Action

Manage page on My Rotary

Flexible options for clubs page on My Rotary

Recommended Rotary Club Bylaws and

Recommended Rotaract Club Bylaws
Standard Rotary Club Constitution and
Standard Rotaract Club Constitution

Engaging Club Members/Attracting New Members

Learning Center courses:

Best Practices for Engaging Members

Creating an Inclusive Club Culture

Strategies for Attracting New Members

Diversify Your Club

Online Membership Leads

Resources:

Connect for Good PDF

Improving Your Member Retention PDF

Diversifying Your Club: Member Diversity Worksheet

Finding New Club Members: Identifying

Prospective Members Worksheet

Engaging Younger Professionals page on Rotary.org

Creating a Positive Experience for Prospective Members PDF

Courageous Conversations

Learning Center course:

Essentials of Understanding Conflict

TRF & My Club

The Learning Center (many courses)

Every Rotarian Every Year Brochure

The Rotary Foundation Reference Guide

Donor Recognition (Web)

Grants (Web)

The Rotary Foundation Showcase Video

Why Rotary? – Wheelchair Video

Use this QR code to get this page with all the links!



Your Great Lakes PELS Leadership Team

General Chair	PDG Sue Goldsen D-6400
Operations Director	PDG Nathan Triplett D-6360
Vice-Chair	PDG Ed Van Wijk D-6540
Lead Facilitator/Curriculum Chair	PDG Sue Goldsen D-6400
Curriculum Coordinators	PDG Jon Catlin D-6310 & Holli Seabury D-6540
Secretary	PDG Teresa Brandell D-6360
Registrar/Webmaster	PDG Karen Gabrys D-6380
Assistant Registrar	DGND Roma Murthy D-6380
Treasurer	Joe Sawyer D-6310
Sargeant at Arms	PDG Melanie McCoy D-6310
Audio Visual	PDG Larry & Sarah Wright D-6400
Marketing/App/Stage Manager	Carrie Strohkirch D-6310
PN Facilitator	PDG Kathy Gallagher D-6360

District 6290

DG Mark Andresky
DGE Julie Schumaker
DGN Paula Jastifer
Dale Horowski, Learning Facilitator

District 6330

DG Jeffrey Ferweda
DGE Lorna Gunning-Fratschko
DGN Dawn Kennedy
Cindy Benning, Learning Facilitator

District 6380

DG Wendy Jones
DGE Lee H. Halsted
DGN Renee Roberts
PDG Don "Sparky" Leonard, Learning Facilitator

District 6540

DG Brent Sheppard
DGE Terri Rickel
DGN Mike Pruitt
PDG Ed van Wijk, Learning Facilitator

District 6310

DG Paul Wiese
DGE Jon Catlin
DGN Carrie Strohkirch
Tara Welch, Learning Facilitator

District 6360

DG Jackie Huie
DGE Tim Lee
DGN Chris Lewis
PDG Teresa Brandell, Learning Facilitator

District 6400

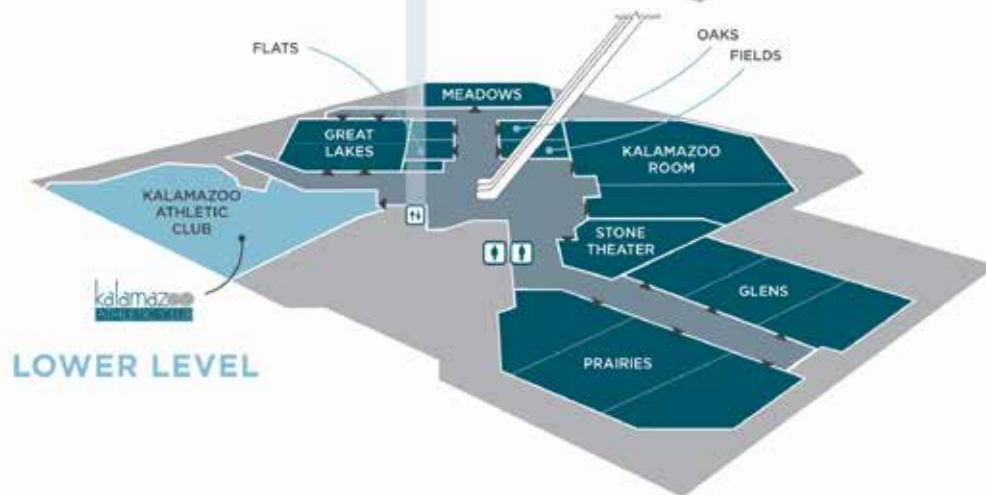
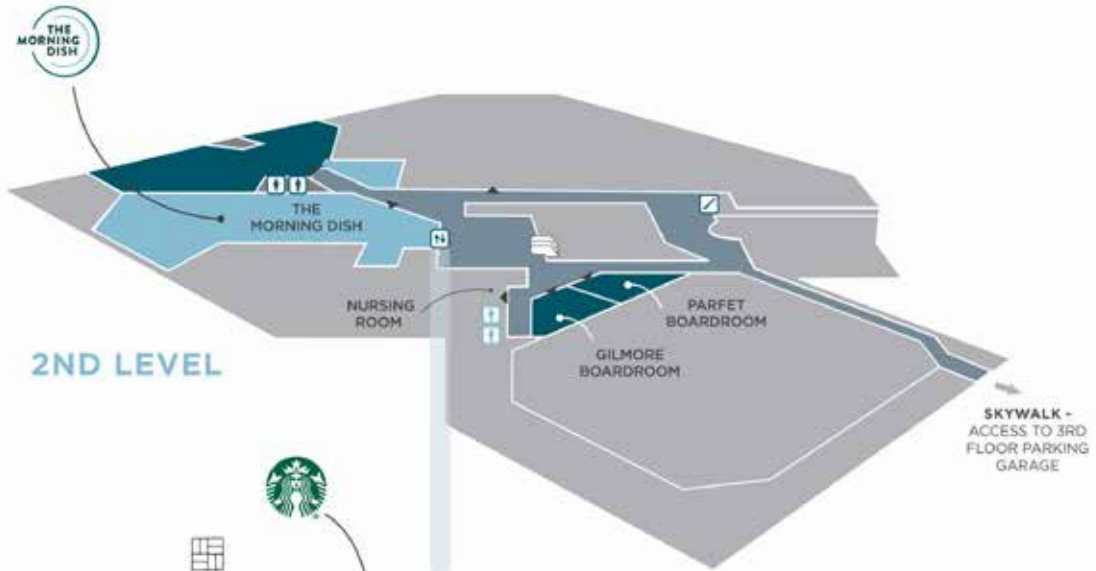
DG Linda Morrow
DGE Kim Spirou
DGN Therese Maggioncalda
PDG Traci Sincock, Learning Facilitator

Thank you to all of our Facilitators!



After the final Plenary Session, please take a few minutes to let us know how we did. This QR Code links to our Conference Survey and will be active from 2 pm on March 21 until April 4, 2026.





-  STAIRS
-  ELEVATOR
-  BATHROOMS
-  GENDER-NEUTRAL BATHROOMS