


# Revitalizing Rotary

Presentation to:  
Rotary International Board of Directors  
Rotary Foundation Trustees

Research findings  
January 25, 2012

+ siegel  
gale

simple is smart



**“The world is a  
changing place;  
we must be prepared  
to change with it.”**

– Paul P. Harris, Founder, Rotary International

Why are we here?

**1. Recognition**

**2. Relevance**

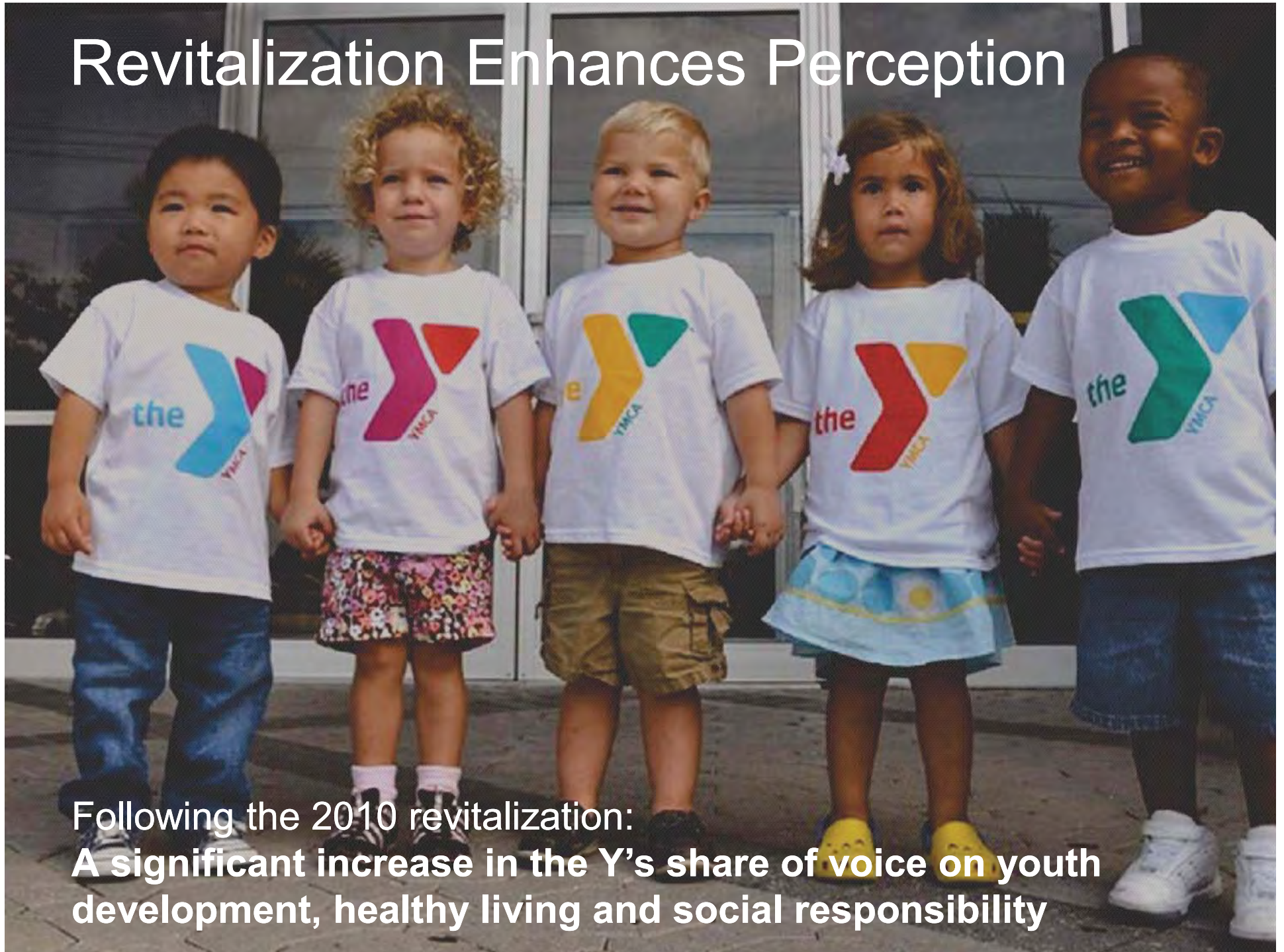
**3. Survival**

# Revitalization Drives Membership

Following the 2007 revitalization:  
**Addition of 1 million members in  
2007—the biggest growth ever**



# Revitalization Enhances Perception



Following the 2010 revitalization:  
**A significant increase in the Y's share of voice on youth development, healthy living and social responsibility**

# Revitalization Increases Revenue

Five years following launch:  
**Increased revenue from 3B to 9B**





## Revitalization Drives Giving

Following the 2000 revitalization:  
**A 28% increase in online donations**

unicef 

# Revitalization Expands Partnerships

Following the  
2003 revitalization:  
**Increased visibility by  
working with a record-  
high 116 partner  
organization in  
2005 alone**

**skoll**  
FOUNDATION



# Revitalization drives social impact and business results

## Internal Benefits

- + Clarity of purpose
- + Filter for decision-making
- + Motivator for current members and staff
- + Efficiencies in communications

## External Benefits

- + Recognition in the world
- + Differentiation from peers
- + Recruitment of members, donors and volunteers
- + Engagement with community
- + Appeal to strategic partners



**Impact + Performance**

# Agenda

Overview

Current Situation

Building the Story

Implications

Discussion

Next Steps

## Project objectives

Through a revitalization effort, we strive to:

- + **Clarify** what Rotary stands for, why it's different and why people should care
- + **Elevate** awareness and understanding of Rotary's impact in its communities and the world
- + **Motivate** current members, donors, strategic partners and staff to be actively engaged with Rotary
- + **Inspire** prospective members, donors and strategic partners to select Rotary as their organization of choice

## Today's objective

- + **Share** findings to date
- + **Engage** in a strategic discussion
- + **Determine** the building blocks for a clear, credible and compelling strategic platform

# Project overview

**1**

**Research  
and  
Analysis**

**18 Weeks**

**2**

Strategy,  
Messaging,  
Organization  
Implications

16 Weeks

**3**

Brand  
Architecture

8 Weeks

**4**

Visual  
Identity

16 Weeks

**5**

Guidelines

4 Weeks

**6**

High-level  
Implementation  
Plan

4 Weeks

## Who we talked to

**150+** individuals across regions and levels, including:

- + RI Board Members
- + TRF Trustees
- + RI Presidents (past, current and elect)
- + District Governors
- + Key Secretariat Leadership
- + Committee Members
- + Rotary Club Members
- + Strategic Partners
- + General Public (prospects)

# Interviewees represented over 40 cities and towns in 17 countries

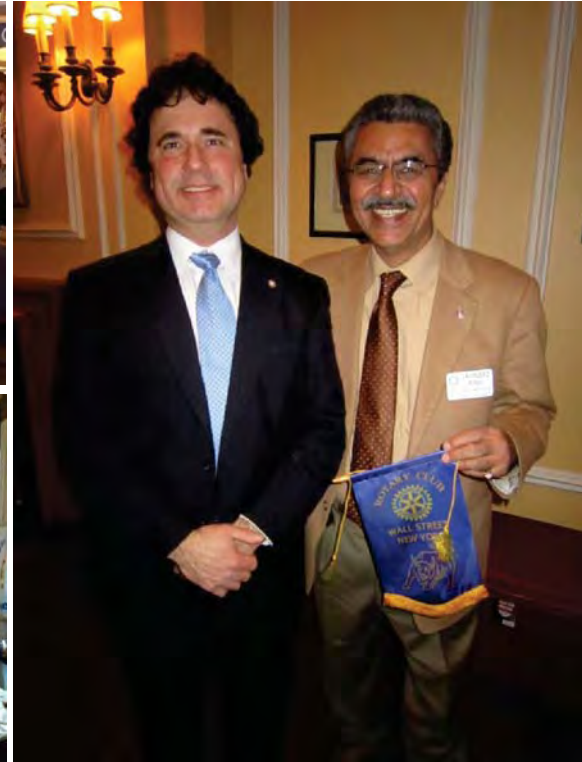


## Where we visited

+ **Asia, Europe, North America, Southern Hemisphere**

+ **20** club visits in **9** cities across **6** countries

+ **5** institute meetings





## What we reviewed

### **Strategic materials and research review**

Reviewed RI and TRF strategic and background materials, RI Public Image Survey, RI Membership research and focus groups, VSA findings

### **Competitive review**

Reviewed external communications materials, websites and social media of Bill and Melinda Gates Foundation, Clinton Foundation and CARE

### **Communications review**

Reviewed 400+ internal and external communications materials, websites and social media for RI and TRF

### **Secondary research**

Reviewed press, articles and papers relating to social sector trends

## Who we surveyed—EyeOpener™ methodology

- + Siegel+Gale conducted an online survey among Donors (both of Rotary and peers) in **14** countries
- + Used two sources for sample: a respected online panel and Rotary's lists

Country	Panel	Rotary Lists	Total
Australia	38	58	96
Brazil	38	27	65
British Isles (England/Ireland/Scotland/Wales)	37	46	83
Canada	25	20	45
Germany	38	39	77
India	25	12	37
Japan	25	18	43
Korea	25	1	26
Mexico	37	15	52
South Africa	37	24	61
United States	77	60	137
TOTAL	402	320	722

*\*Primary screening criteria: Have you donated time and/or money to a charitable organization outside of your church, mosque, temple or synagogue in the past two years?*

## Who we surveyed—EnGage™ methodology

EnGage reached a broad range of key audiences:

**+ 10,612** respondents from **167** countries

+ Current Rotarians (9,840)

– ~50% more than 10 years; ~20% for 2 years or less

+ Staff (386)

+ Former Rotarians (77)

+ Current/Former Rotaractors (587/108)

Data collected November–December 2011;  
RI assisted in drafting and administering survey

# Agenda

Overview

**Current Situation**

Building the Story

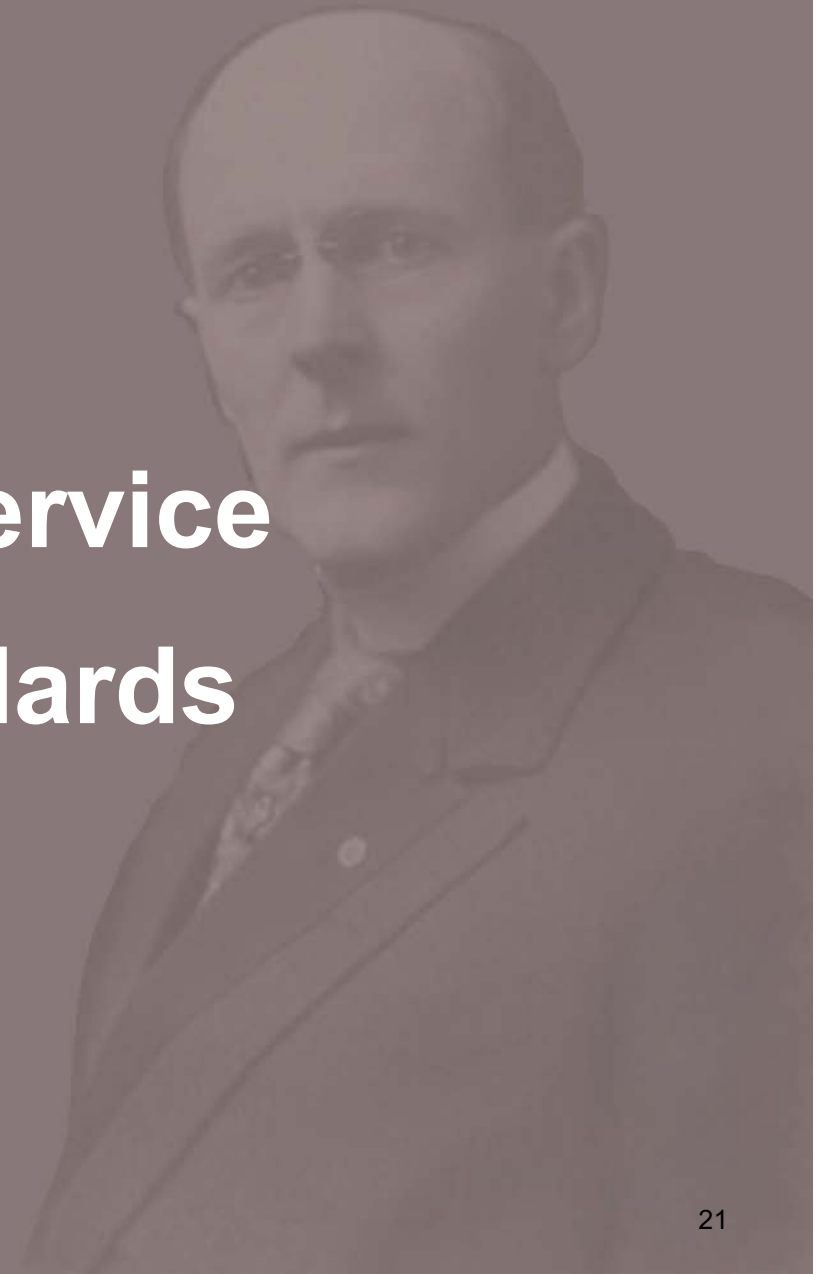
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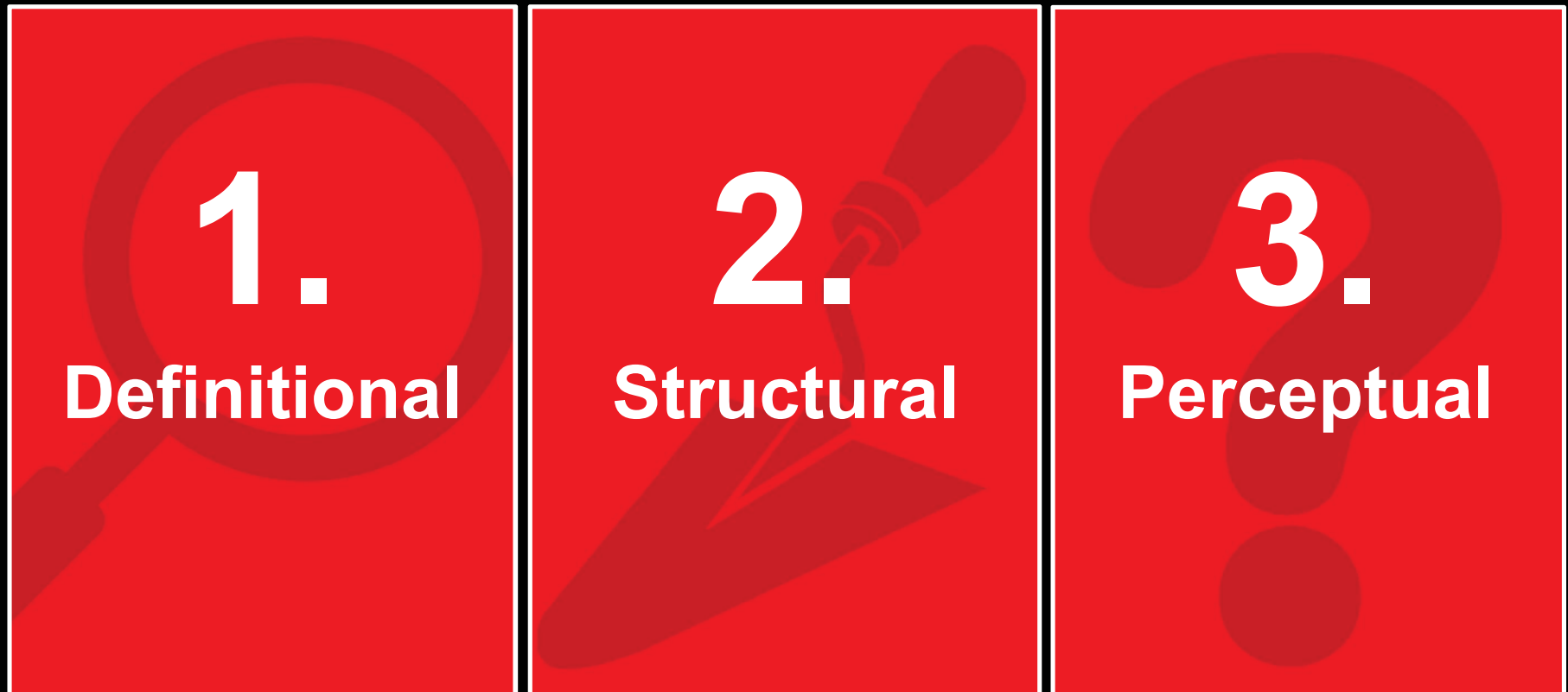
You have a long and proud history

- + **Fellowship and friendship**
- + **Commitment to service**
- + **High ethical standards**
- + **Local community, global reach**



But past success doesn't ensure future success

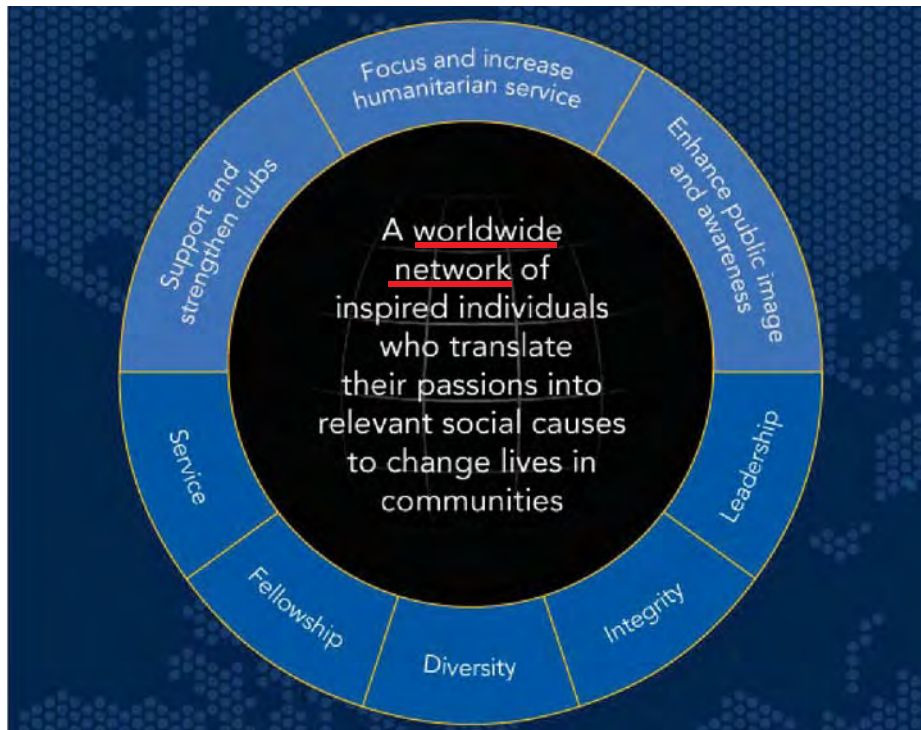
## Critical Issues



## 1. Definitional

**“If you ask 10 people what Rotary stands for, you’ll get 10 answers.”**

Internally, you struggle to define yourself



### WHAT IS ROTARY?

Rotary is one of the world's largest humanitarian organizations, with 1.2 million members in over 200 countries and geographical areas. Rotary club members, coming from all political, social, and religious backgrounds, are united in their mission to promote international understanding through humanitarian and educational programs.

# What's Rotary?

Rotary is a volunteer organization of 1.2 million business and professional leaders united worldwide to provide humanitarian service and help build goodwill and peace. About 32,000 Rotary clubs in more than 200 countries and geographical areas conduct projects to address today's challenges — including illiteracy, disease, hunger, poverty, lack of clean water, and environmental concerns — while encouraging high ethical standards in all vocations.





# Communications do little to clarify



- 1. Is it the **TRUTH**?
- 2. Is it **FAIR** to all concerned?
- 3. Will it build **GOODWILL** and **BETTER FRIENDSHIPS**?
- 4. Will it be **BENEFICIAL** to all concerned?

**The Object of Rotary** is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

**FIRST:** The development of acquaintance as an opportunity for service;

**SECOND:** High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

**THIRD:** The application of the ideal of service in each Rotarian's personal, business, and community life;

**FOURTH:** The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

- Avenues of Service**
- Club Service
  - Vocational Service
  - Community Service
  - International Service
  - New Generations Service

- AREAS OF FOCUS**
-  Peace and conflict prevention/resolution
  -  Disease prevention and treatment
  -  Water and sanitation
  -  Maternal and child health
  -  Basic education and literacy
  -  Economic and community development



# A closer look reveals an identity crisis



# Creating confusion about what you stand for and why people should care



social club

**OR**

humanitarian organization

local community

**OR**

global network

good for me

**OR**

good for society

singular focus

**OR**

many areas of focus

# The result: people default to what they know



## Polio

Apply for a PR grant by 15 July to enhance Rotary's image

By Vanessa Glavinskas and Arnold R. Grahl  
Rotary International News -- 5 July 2011

Print  
E-mail page  
Share



The Capitol of Puerto Rico shines with an End Polio Now message, part of an integrated public relations campaign that included billboards, radio, and media interviews. Photo by Menolo Diaz

**End polio worldwide.**



Rotary. Humanity in motion.  
rotary.org/endpolio



## Size

About Us

Print  
E-mail page



What would it take to change the world? Rotary's 1.2 million members believe it starts with a commitment to Service Above Self.

In more than 34,000 clubs worldwide, you'll find members volunteering in communities at home and abroad to support


*1.2 million business, professional, and community leaders*

*More than 200 countries and geographical areas*

*Providing humanitarian service*

*Building goodwill and peace in the world*

educa  
eradic



**rotary**

*1.2 million business, professional, and community leaders*

*More than 200 countries and geographical areas*

*Providing humanitarian service*

*Building goodwill and peace in the world*



**“Rotarians don’t understand who or what we are.**

**We have to educate ourselves and our members first, before we can successfully do so with the general public.”**

## 2. Structural

**“We are our  
biggest  
impediment.”**

Source: Rotary leadership



# Your legal and organizational structure has created internal silos



# Missing the opportunity to convey shared goals



## Rotary International mission

“...provide service to others, promote integrity, and advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders.”

## Rotary Foundation mission

“...enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.”



## Or aggregate shared value and impact



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**“It’s because we have business professionals working together that we can solve social problems differently.”** – *Rotarian*



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**“Research has never been compiled of how much work we’re doing. We should measure Social Rate of Return. Can’t we work with SRR every year to see what we have given to the world?”** – *Rotarian, Rotary Institute Kolkata*

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# Bureaucracy has displaced business thinking



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**“It’s unclear who is in charge and how decisions are made.”**

– *Strategic partner*



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**“There is a tendency to have too many committees...no one with specific responsibilities.”** – *Strategic partner*

## Current structure does not support long-term planning or implementation



**“Every year there is a new president. It’s not until he is eight months into his term that his message reaches the club-level and, at that point, he is a lame duck.”**

*– Rotarian, Rotary Institute Palm Springs*



**“The to-ing and fro-ing and the numbers of hands involved create a lot of miscommunication. This becomes quite cumbersome and doesn’t pave the way for smooth implementation.”** *– Strategic partner*

## And places undue pressure on members



**“To take on a leadership role, you need to take a 1-year leave of absence from your job—spending weeks at institutes and traveling, and spend about \$100,000/year attending events.”** – *Rotarian, New York*



**“We concentrate on raising too much money from the same people. Until Bill Gates, the money kept coming from members. This is a public issue, yet we don’t raise funds from the public.”** – *Rotary leadership*

## The result: mass inefficiencies



**“It costs over \$50,000 a year to be a good Rotarian. I should be spending \$5,000 on attending meetings and giving the other \$45,000 to charity.”** – *Rotarian, Rotary Institute*



**“I critically look at money spent on service vs. fellowship. If I spend 50% of my budget on food and drink, I’m no good. But 80% service and 20% food, excellent. Prove you exist for a cause.”** – *Rotary leadership*

Ultimately, you fail to tap into your greatest assets   



**“If you looked at the positions within our structure, it’s not based on the skills and talent.”** – *Rotary leadership*



**“All people are asked for is classification. What this doesn’t take into account is if you can build walls, fly planes...skills that can help further the organization.”** – *Rotary staff*



**“The staff is understaffed and somewhat mistreated. People have discounted them and their credentials.”** – *Rotarian, Rotary Institute Palm Springs*

### 3. Perceptual

**“A bunch of  
guys meeting,  
eating lunch  
and singing.”**



# In the U.S., you're often seen as a network for small businesses



**“I think it’s a group of business people with a town presence.”**

– *General Public, Illinois*



**“It’s an opportunity for small business owners to connect.”**

– *General Public, New York*



**“A place where old guys get together and tell war stories.”**

– *General Public, California*



**“It’s a platform for people to network.”**

– *General Public, California*



# Globally, there is greater understanding and prestige



**“An international club that exists everywhere...”**  
– *General Public, France*



**“It’s an NGO with branches in the main cities of Brazil and around the world.”**  
– *General Public, Brazil*



**“It’s like a secret society.”**  
– *General Public, Africa*

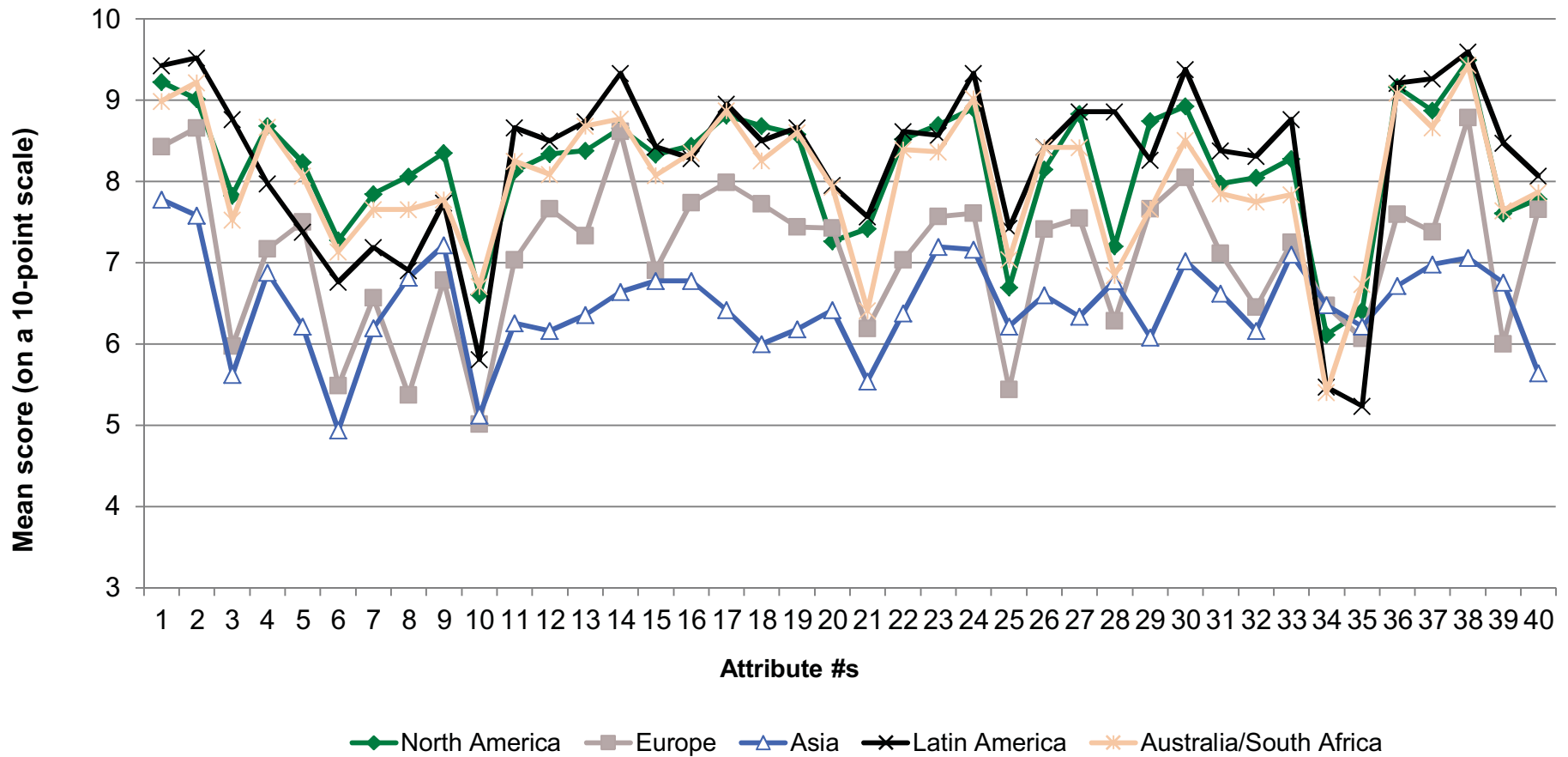


**“The presidents of companies get together and share views.”**  
– *General Public, Japan*

Even among those that should know you,  
you lack a consistent reputation



**Member-Donor Perceptions of Rotary by Region**



The result: a large perceptual gap between internal and external audiences



**0.75** Is typical gap

Mean Attribute Ratings for Rotary Across 40 Attributes

**2.27** Perceptual gap globally (non-U.S.)

**3.39** Perceptual gap in North America

Despite recent improvement, you're still not getting all the credit you deserve



## Bill Gates Push to Reach Polio-Free World Gets Boost as India Foils Virus

Bloomberg, Jan. 12, 2012

**“Today marks a year since the last case of new polio infection in India...The effort is the result of decades of work by Rotary International, along with The Centers for Disease Control and Prevention, the WHO and UNICEF. But it probably wouldn't have gotten this far without the support and advocacy of the Bill & Melinda Gates Foundation.”**

“Bill Gates On India's First Polio-Free Year”, Forbes, Jan. 12, 2012

**The challenges you  
face go beyond an  
identity crisis or  
communications issue**

**They require an  
organization-wide  
transformation**

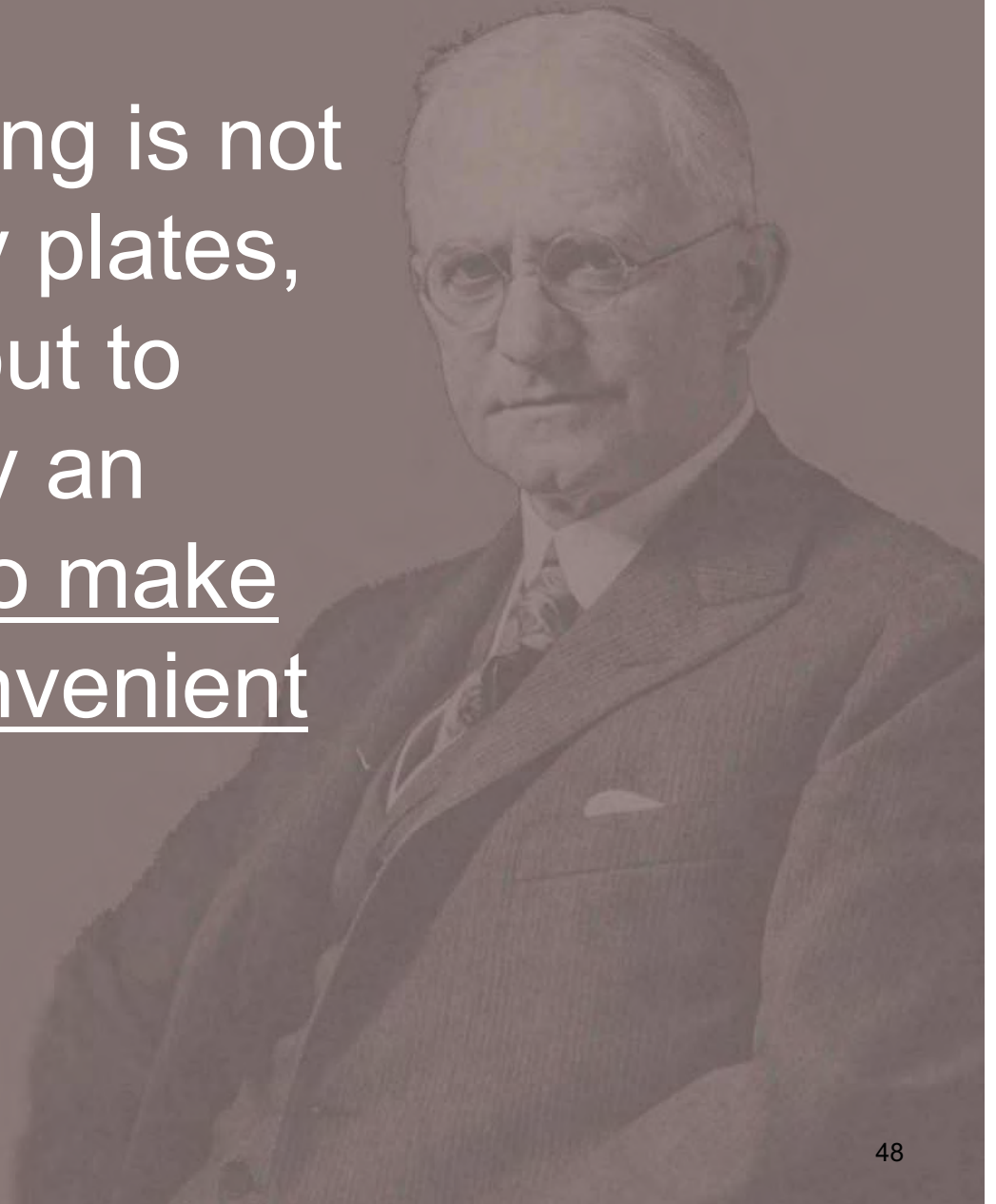
Remember this once mighty organization?



It was founded with a clear purpose

“What we were doing is not merely making dry plates, we were starting out to make photography an everyday affair...to make the camera as convenient as the pencil.”

– Eastman Kodak





But over time, it lost its way



“As the world’s foremost **imaging** innovator, Kodak helps consumers, businesses and creative professionals unleash the power of **pictures** and **printing** to enrich their lives.”

Source: Kodak website

It focused on the “what” instead of the “so what”

**What**

**So What**



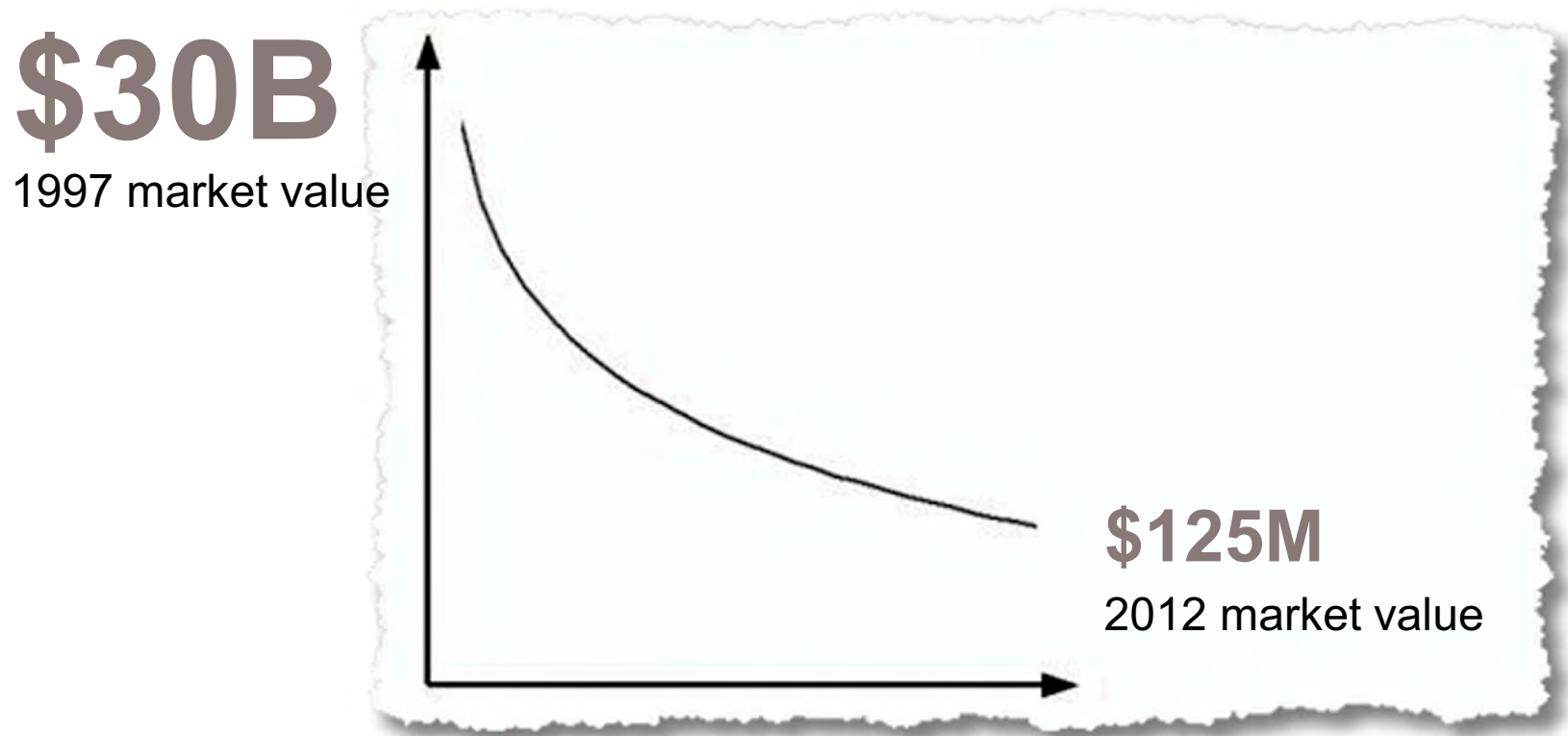
**Products/Services**  
(What you do)

**Purpose/Cause**  
(Why it matters)



Today, the organization is in a fight for survival

## “Eastman Kodak Files For Bankruptcy”



Source: NYT, Jan. 19, 2012

“Look at Eastman Kodak—  
they had the wherewithal.  
They could have been Apple or  
Amazon. **They didn’t see what  
they needed to do. Rotary is  
in the same boat today.”**

**The right story  
can lead the way**

# Agenda

Overview

Current Situation

**Building the Story**

Implications

Discussion

Next Steps

# Building the right story





# Environment



**The social sector  
is exploding**

# Governments are struggling to meet fundamental needs

**“HIV/AIDS continues to devastate the Africa Region.”**

The African Regional Health Report:  
The Health of the People

**“The European Union will see an increase in health expenditure.”**

Europe's Failing Health, WSJ, Mar. 28, 2011



CNN, Oct. 5, 2011

**“France’s Downgrade Threatens the Eurozone’s AAA.”**

The Huffington Post, Jan. 16, 2012

**“China jails veteran activist Chen Wei as crackdown continues.”**

The Guardian, Dec. 23, 2011



**“Syria: heading for civil war”**

Middle East Live Blogging,  
The Guardian

# Increased reliance on NGOs/nonprofits to fill the gaps



**1,238,201**

Charitable organizations  
in the U.S. alone



**57%**

Over the last  
10 years

Several factors have helped catapult growth:  
expanded channels...

High net-worth individuals

BILL & MELINDA  
GATES *foundation*

Investors

GOOD



Everyone

KICKSTARTER



# ...new models...

## P2P



## Mobile

Deadline

Für Deine 5 € zum Schutz der Tiger, sende eine SMS\* mit „Tiger“ an 81190. Oder klick' hier und unterstütze den WWF mit 10 €\*\*.

USE YOUR HYVE TO SAVE A LIFE

STOP AIDS NOW!

## One-for-one

With every pair you purchase, TOMS will give a pair of new shoes to a child in need. One for One.™



## Daily deal



“Instead of selling something, we’re sharing the story of a new nonprofit every day...you can give them \$1 (or up to \$10). We’re trying to make doing good a habit.”

# ...and tools

## Gift cards



## Discount fundraising cards



“Provides discounted fundraising gift cards to youth-serving nonprofit organizations. The fundraising groups then sell the purchased cards at face value, keeping the remaining profits.”

## Emails



# Causing increased competition from all sides



## Traditional

For members



For donations (private and public)



## Non-traditional

Top down



Bottom up



**The emerging  
“for-benefit” sector  
is redefining the  
nonprofit model**



# The old structure is not working anymore

Bureaucracy and lack of innovation and transparency plague many nonprofits today



“...a **desperate group of aging members and endless meetings** about bill-paying, bad food, and who is going to iron the degree uniforms.”

“Latest Freemason Conspiracy: Recruiting Younger Bros”, WSJ, Oct. 11, 2011



“Like so many other charities, it is **more preoccupied with “organizational survival”**... than it is with its mission. **As a result, it continues to make bad decisions.**”

“What the America Red Cross Scandal Says About All Charities”, The Chronicle of Philanthropy, Dec. 12, 2007

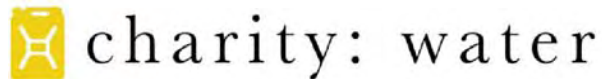


**National Institute  
for People With Disabilities**

“**YAI to Pay \$18M in False Claims Settlement**”

NYNP, Jan. 19, 2011

# Stand-out nonprofits blend social missions with business practices



“For its growth, [Charity Water] has relied on methods borrowed from social media and from the way start-ups operate.”

**↑ 400%**  
Charity Water’s growth over the last 4 years

**↓ 10%**  
Charitable giving in the U.S. over the last 3 years

“One on One: Scott Harrison, Charity Water”, NYT Jan. 2, 2012



“We live and breathe conversion rate, average donation size and basket size.”

**>30%** annual growth in the last 10 yrs

**\$30 million** in funding

**250,000** individual supporters

**60,000** funded classroom projects

“Most Innovative Companies: Charles Best of DonorsChoose.org on Fixing Education”, Fast Company, Mar. 4, 2011

## Pioneering for-profits are taking on causes that can drive brand engagement—and profits



CREATE  
*Jobs for USA*  
★ ★ ★ ★ ★

“While our business contributes to the communities we serve, we recognize that in this time of crisis, we can and must do more—especially when the **small business community, where Starbucks has its roots**, is so challenged.

That’s why **Starbucks has teamed up with the Opportunity Finance Network (OFN) to create and sustain jobs**. We... **will provide financing to underserved community businesses** which include small business loans, community center financing, housing project financing and microfinance.”

**A clear focus,  
accountability and  
proven impact are the  
new gold standard**

# Successful nonprofits have a defined brand promise

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## Organization



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## Promise

“We place **special focus on working alongside poor women** because, equipped with the proper resources, women have the power to help whole families and entire communities escape poverty.”

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## Areas of focus

Help Her **Live**  
Help Her **Learn**  
Help Her **Earn**

Note: Top-down infrastructure

# Successful nonprofits have a defined brand promise, (cont'd)

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Organization



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Promise

**Strengthening the  
Foundations of Community**

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Areas of focus

**For Youth Development  
For Healthy Living  
For Social Responsibility**

# An integrated business strategy

The Bill and Melinda Gates Foundation establishes benchmarking, comparative measurement, and implementation to maximize value and increase problem-solving capacity

## OUR APPROACH TO GIVING



## Exhibit 1: Actionable Measurement Fuels Improvement of Our Work



# And combine concrete demonstrations of impact...

## Active goal setting

**Goal:** To help 35,000 households in Bangladesh double their dairy-related incomes by increasing the amount of milk their cows produce and developing systems for collecting and transporting surplus milk so they can sell more of it in informal markets.

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## Progress measurement

Yearly Targets    Actual

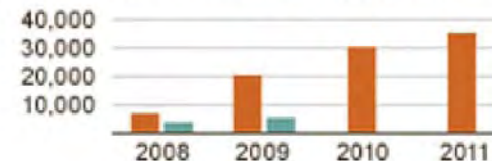
### Selected Objectives:

1

**Objective:** Improve the systems for collecting and storing milk in remote areas of Bangladesh by establishing chilling plants and a network of house-to-house milk collectors.

**Target:** 17 chilling facilities identified and linked to 35,000 farmers.

Number of Farmers Linked to Chilling Centers



2009 Goal: 20,000 farmers

2009 Actual: 5,416 farmers

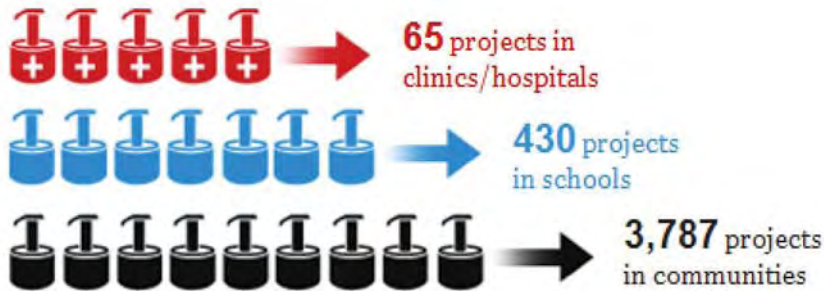


...with emotionally engaging language and imagery

Makes topics real, helps create a more emotional connection and presents information in a way that is clear and universal

 charity: water

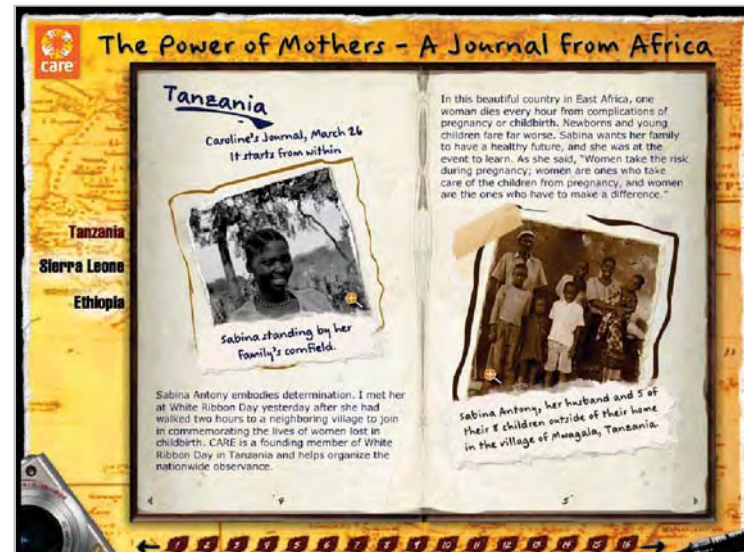
### Infographic



4,282 water projects funded. AS OF 8.15.2011



### Interactive feature



# Summary

## Key trends:

1. The social sector is exploding
2. The emerging “for-benefit” sector is redefining the nonprofit model
3. A clear focus, accountability and proven impact are the new gold standard

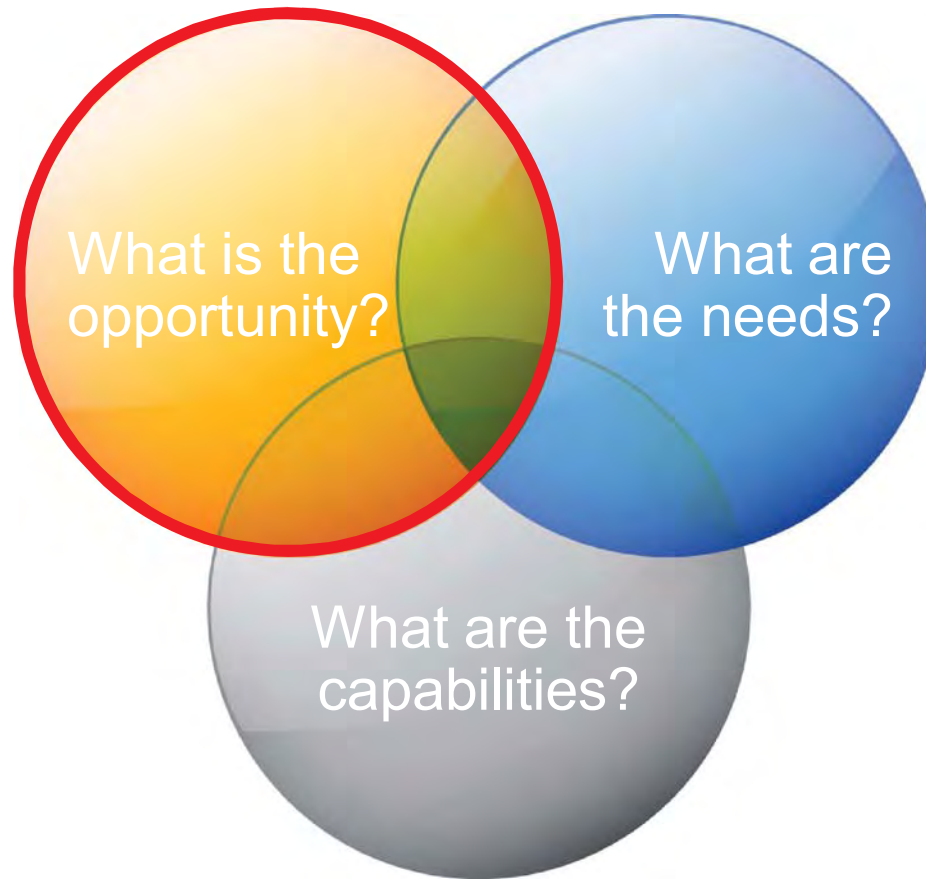
## Opportunity:

**Winning enterprises must unite an entrepreneurial approach, social aims and business results**

# Environment insight

## Environment

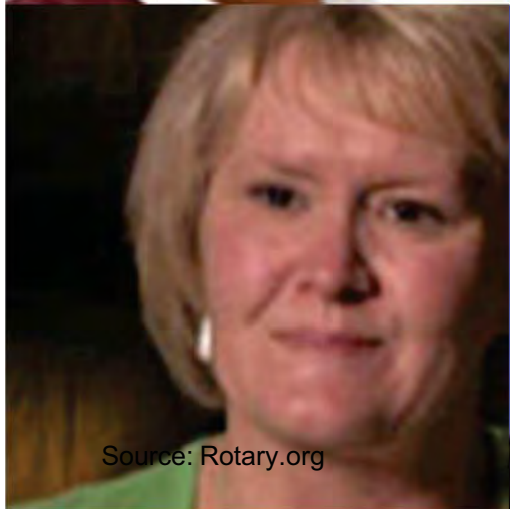
Winning enterprises must unite an entrepreneurial approach, social aims and business results



## Audiences

## Organization

# Audiences



Source: Rotary.org

In this section, we'll focus on two desired outcomes

+ **Donations of time/money**

+ **Member engagement**

# Donation motivators

## Who we surveyed—EyeOpener™ methodology

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Donations

1

**Motivators  
transcend  
geography**



We looked at 40 potential motivators that represent 5 fundamental reasons to donate time and/or money

■ **Approach**

X **Areas of Focus**

▲ **Measurable Impact**

+ **Seen as Influencer**

● **Personal Connection/Participation**

Our analysis reveals consistency on a deeper level

Donors across regions share similar priorities

**19** Shared global motivators

**16** Common global non-motivators

**5** Unique regional motivators

## Donations

### 1. Motivators transcend geography

**2** Nonprofits must have a distinct approach, be engaging and demonstrate impact

# Donors give to nonprofits that champion a point-of-view, instill them with purpose and get results

## Shared global motivators

### APPROACH

- Has a clear focus
- Transparency/Good governance
- Uses funds wisely
- Attracts people of the highest ethical standards
- Unites different skills/perspectives to solve issues
- Engages people of all ages
- Proactive
- Friendly/Accessible
- Can mobilize quickly in times of crisis

### PERSONAL CONNECTION/ PARTICIPATION

- Feels like part of something meaningful
- Helps me set a positive example
- Would be proud to be associated with/part of
- Inspiring donation options
- Keeps me informed on program progress/initiatives
- Opportunities for involvement fit my schedule

### MEASURABLE IMPACT

- Has a long track record of success
- Is in need of donations
- Produces measurable results
- Has global reach and impact

## Donations

- 1. Motivators transcend geography**
- 2. Nonprofits must have a distinct approach, be engaging and demonstrate impact**

**3** **Communicating all the great things you do as benefits rather than facts will help motivate giving**

# Communications must go beyond what we do, and address why we do it and why donors should care

## Common global non-motivators

### AREAS OF FOCUS

- Leader in advancing peace/conflict prevention/resolution
- Dedicated to providing access to water/sanitation
- Leader in promoting basic education/literacy
- Leader in fostering economic and community development
- Leader in disease prevention/treatment

### SEEN AS INFLUENCER

- Elite
- Authoritative
- Public policy makers/influencers turn to for input
- Partner of choice for corporate responsibility initiatives

### PERSONAL CONNECTION/PARTICIPATION

- Strong presence in my local community
- Puts my skills to use to create a positive impact
- Opportunities for professional/personal networking
- Gives me opportunities to lead
- Positively affected someone close to me

### APPROACH

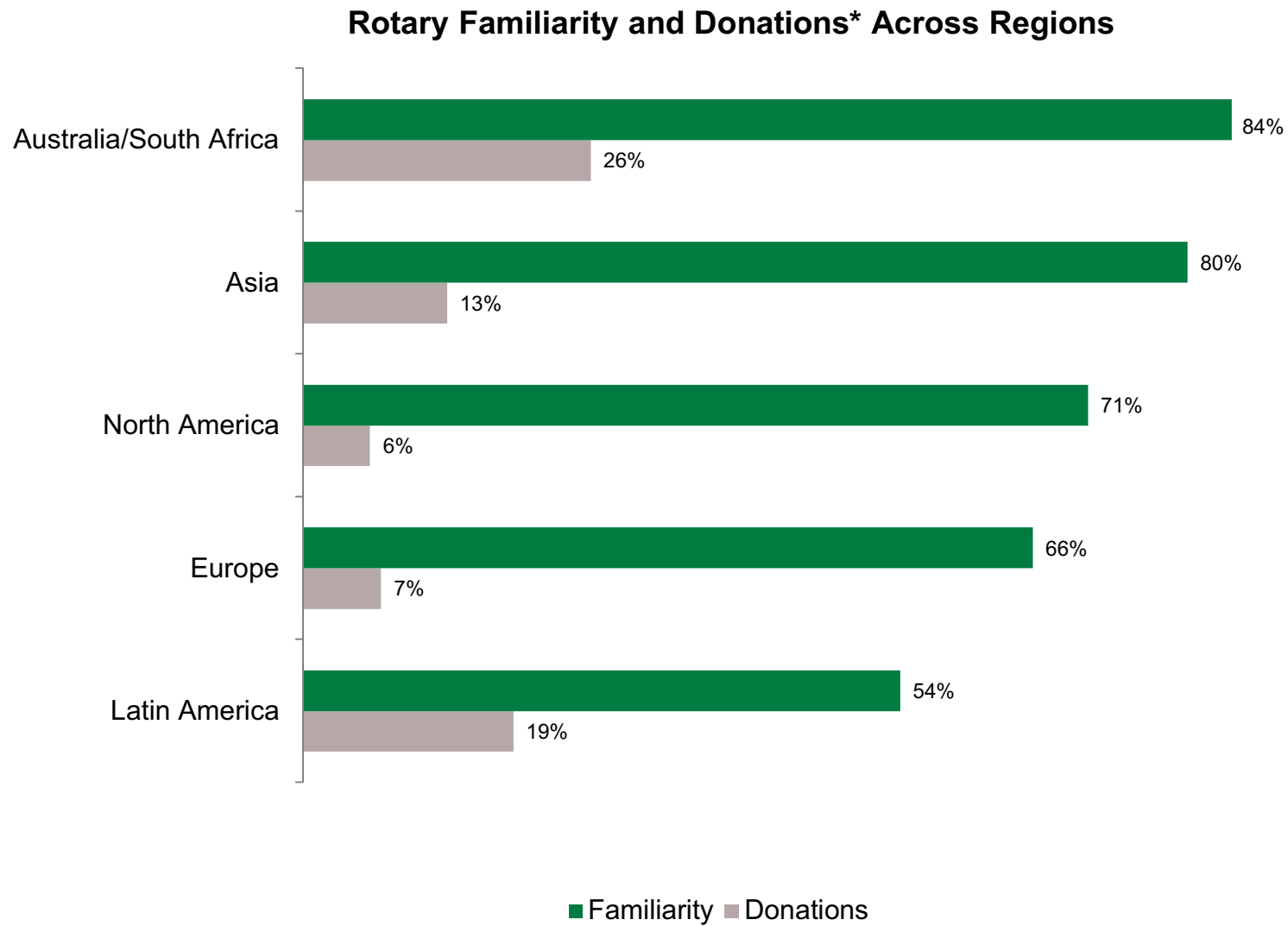
- Provides programs that fulfill unmet community needs
- Attracts business leaders who want to contribute to the greater good

## Donations

- 1. Motivators transcend geography**
- 2. Nonprofits must have a distinct approach, be engaging and demonstrate impact**
- 3. Communicating all the great things you do as benefits rather than facts will help motivate giving**

**4** **Despite surface-level familiarity, Donors don't know Rotary**

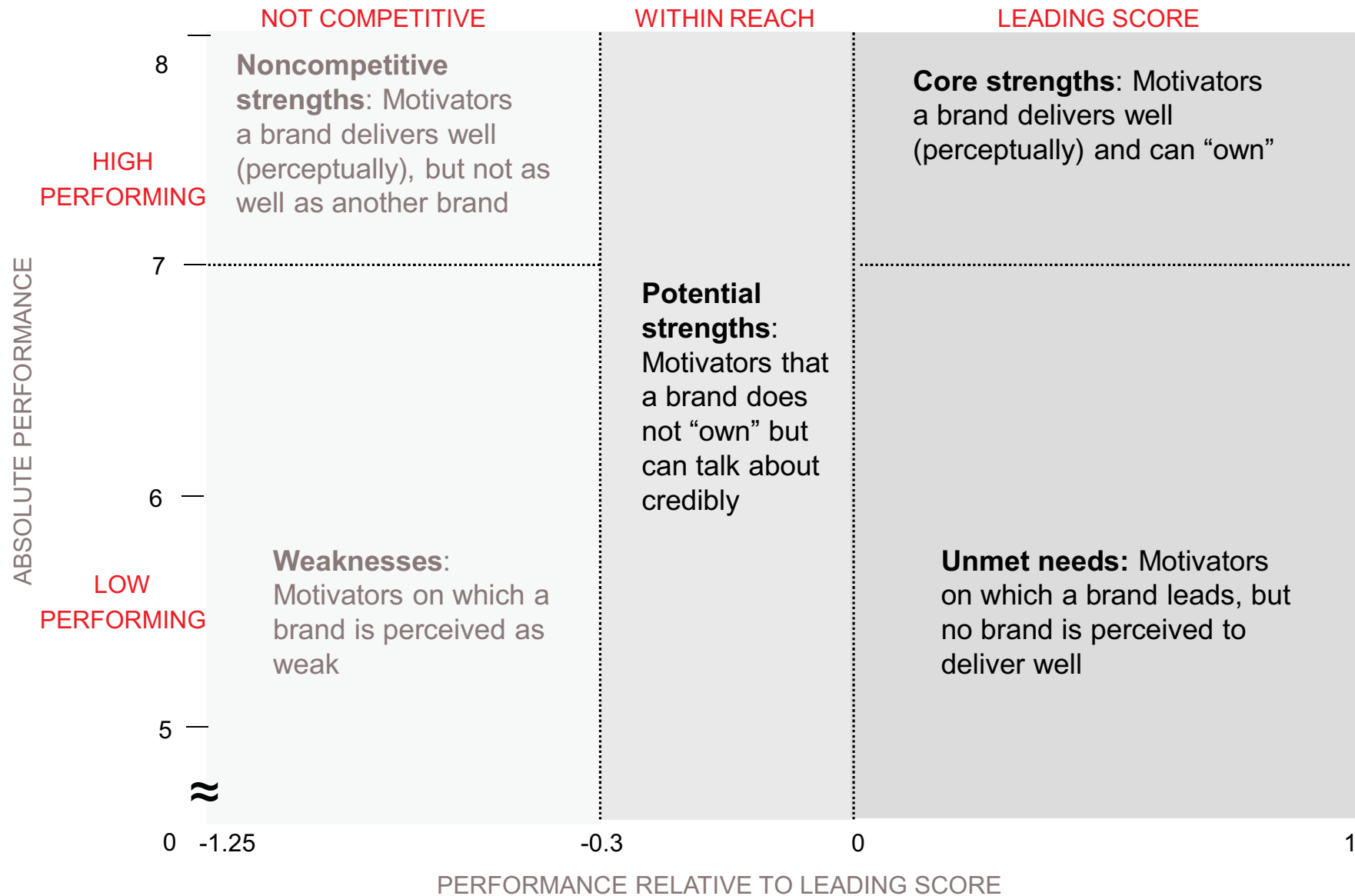
# Donors feel familiar with Rotary to varying degrees



\*Donated time and/or money in the past two years

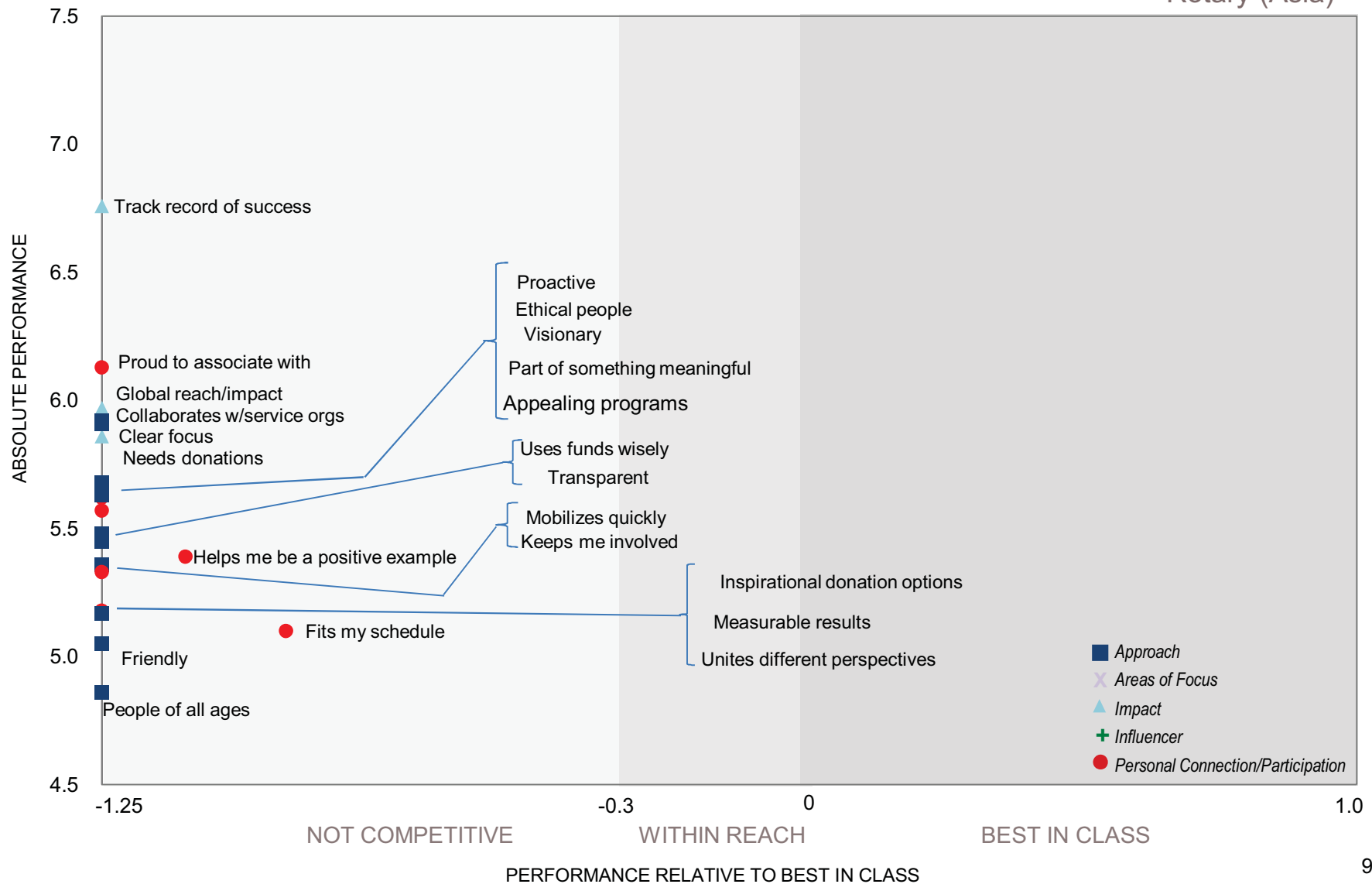


# Perceptual maps demonstrate how Rotary and peers perform

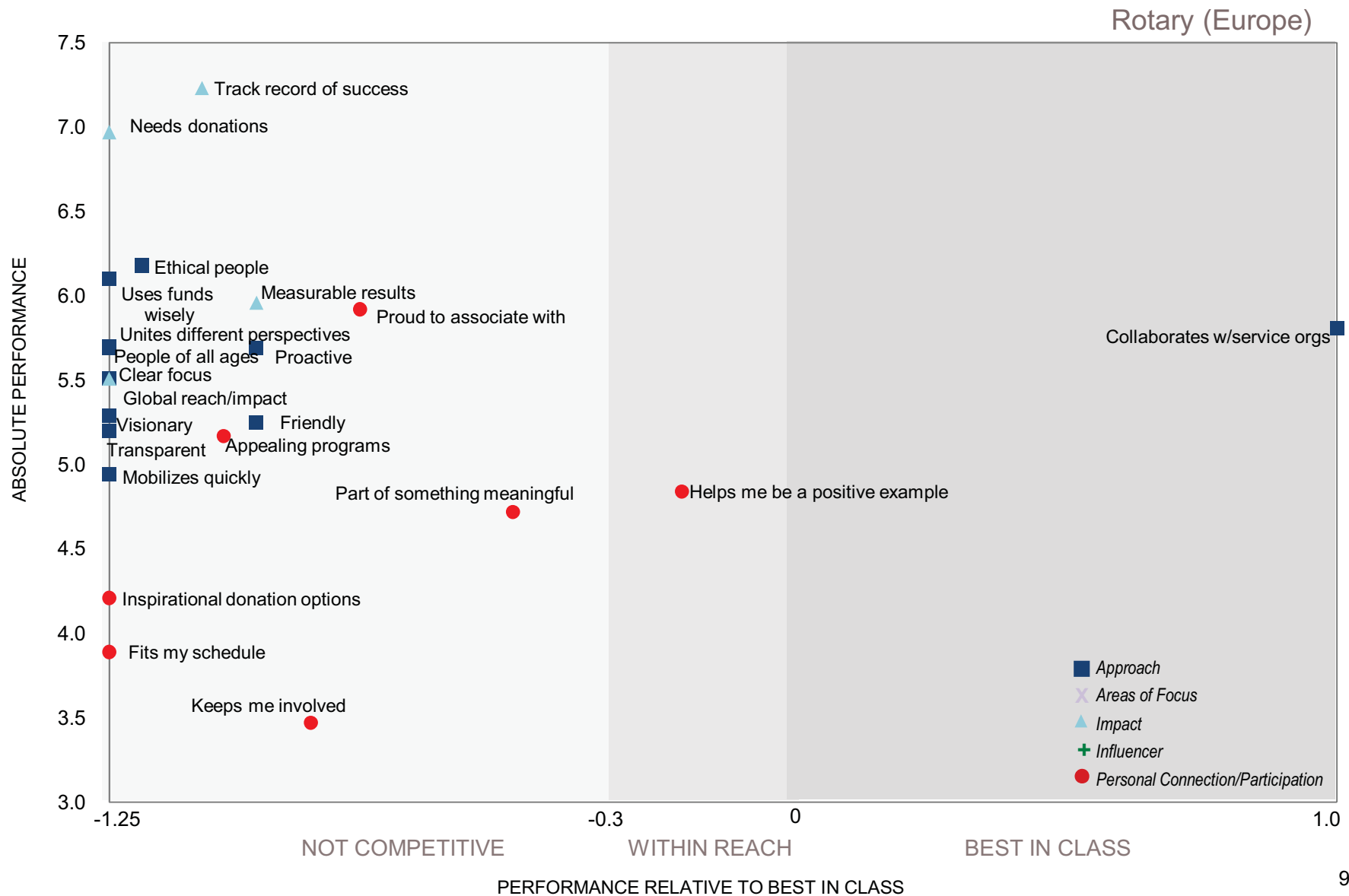


# Asia: familiarity does not translate to understanding and favorability

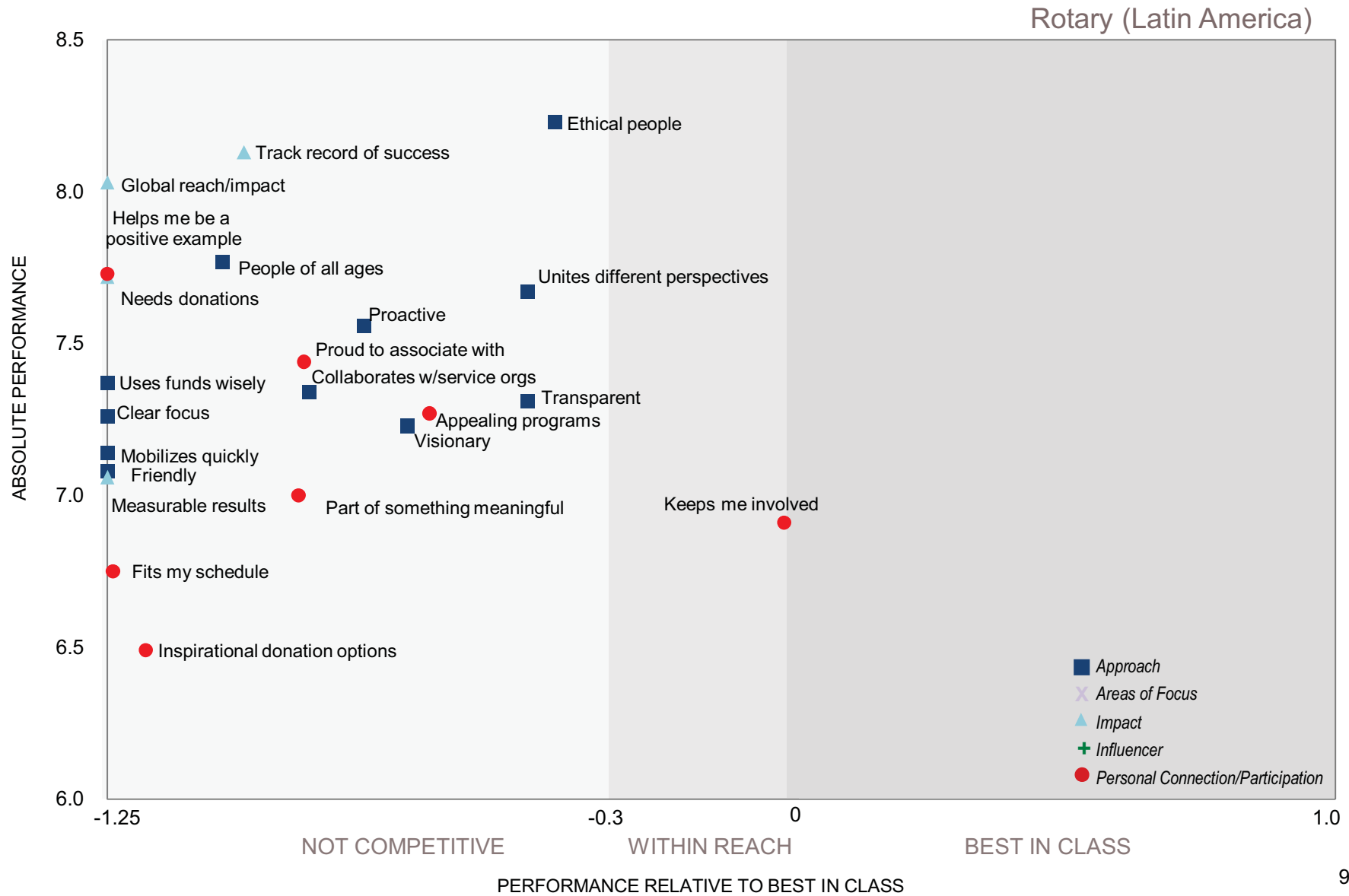
Rotary (Asia)



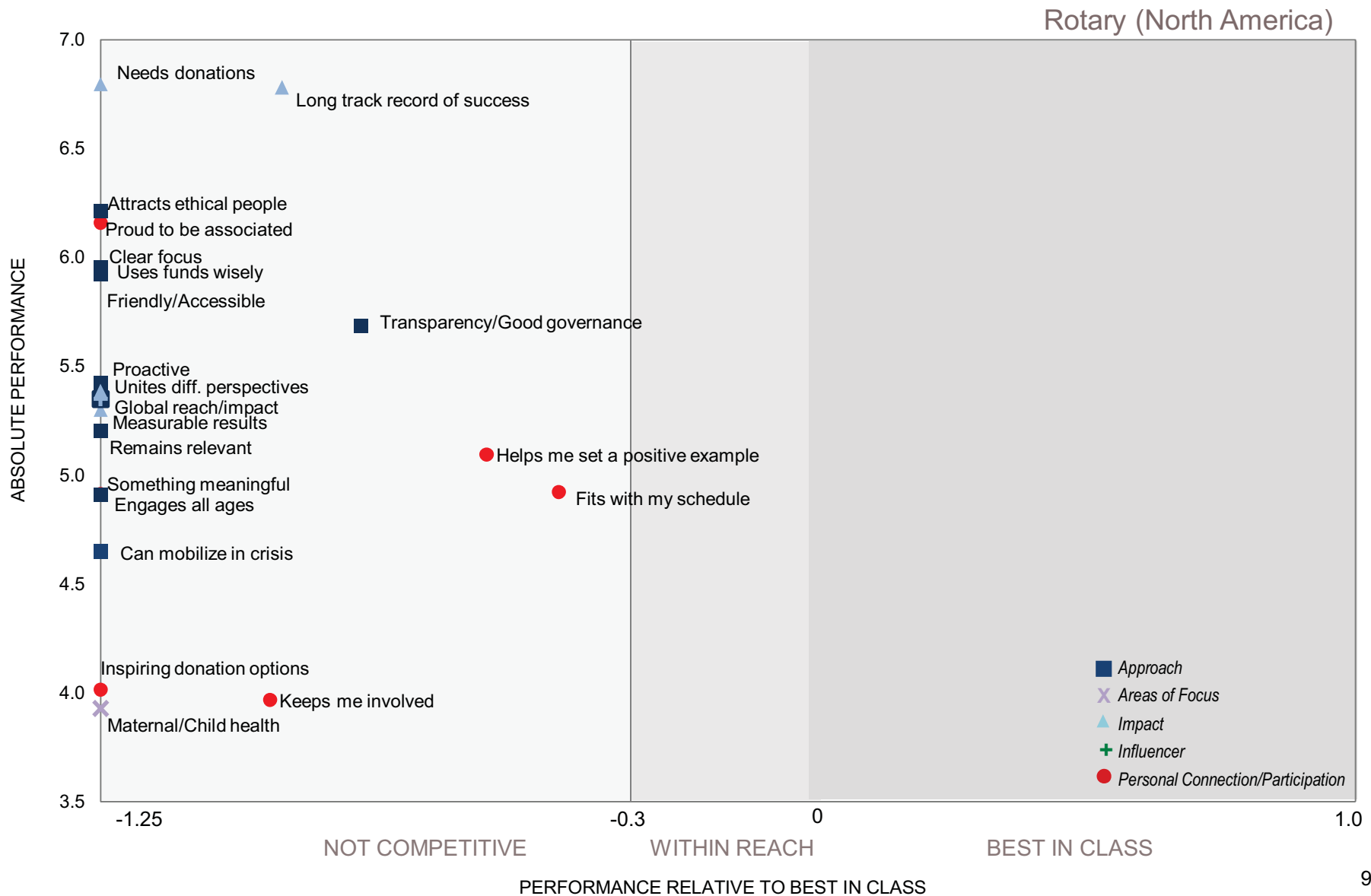
# Europe: donors recognize collaboration, but not much else



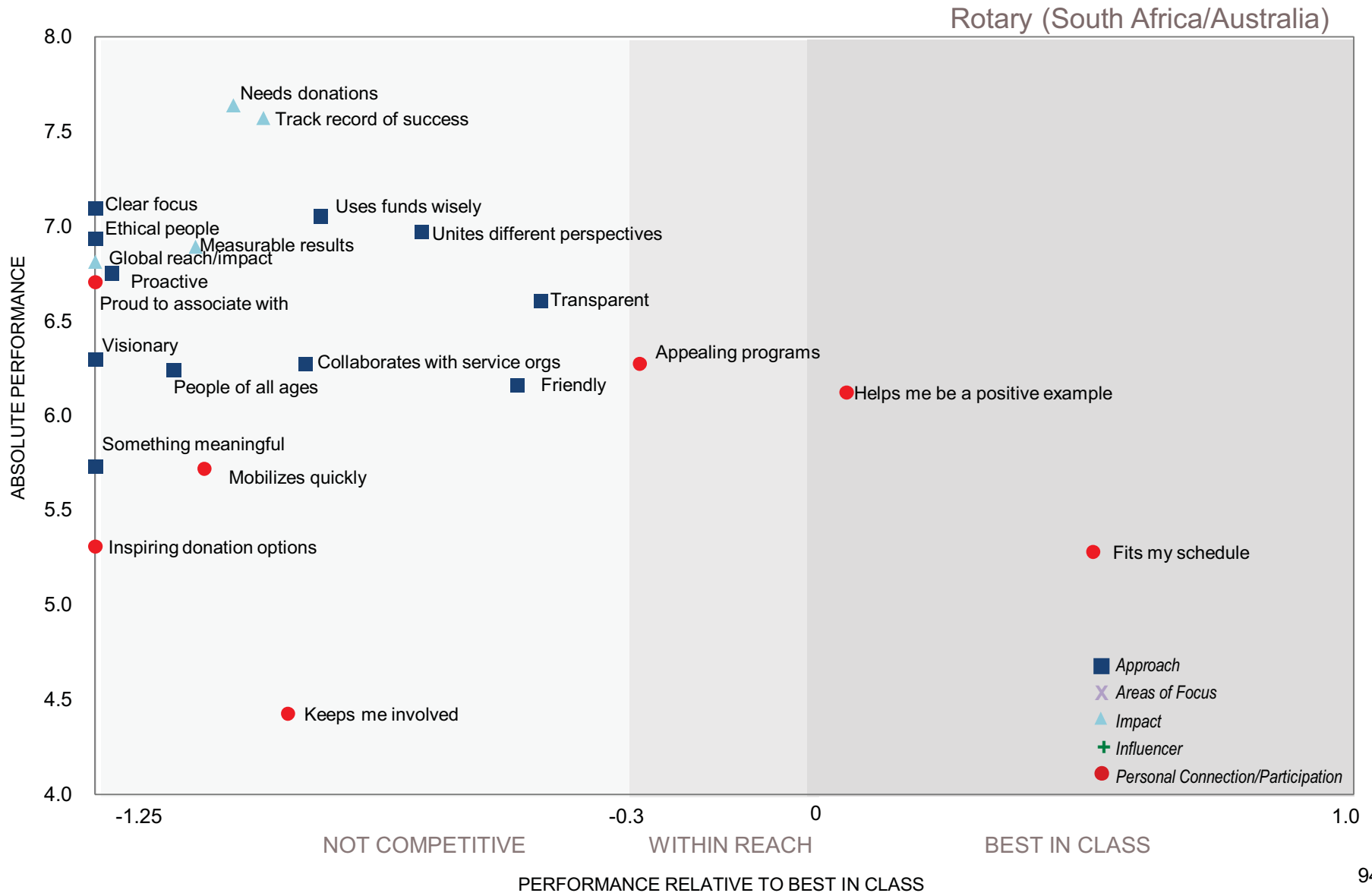
# Latin America: Rotary lacks differentiating strengths



# North America: profile is also weak



# South Africa/Australia: perceived strengths are limited



**It's all about  
focus**

# Member engagement motivators



## Who we surveyed—EnGage™ methodology

EnGage reached a broad range of key audiences:

**+ 10,612** respondents from **167** countries

+ Current Rotarians (9,840)

– ~50% more than 10 years; ~20% for 2 years or less

+ Staff (386)

+ Former Rotarians (77)

+ Current/Former Rotaractors (587/108)

Data collected November–December 2011;  
RI assisted in drafting and administering survey

# EnGage provides insight into members' mindsets

Knowledgeable	<b>Bystanders</b> Understand what the organization stands for but are not committed to it	<b>Champions</b> Understand what the organization stands for and are committed to it
Not Knowledgeable	<b>Weak Links</b> Have no understanding of or commitment to what the organization stands for	<b>Loose Cannons</b> Are committed but do not understand what the organization stands for
	Not Committed	Committed

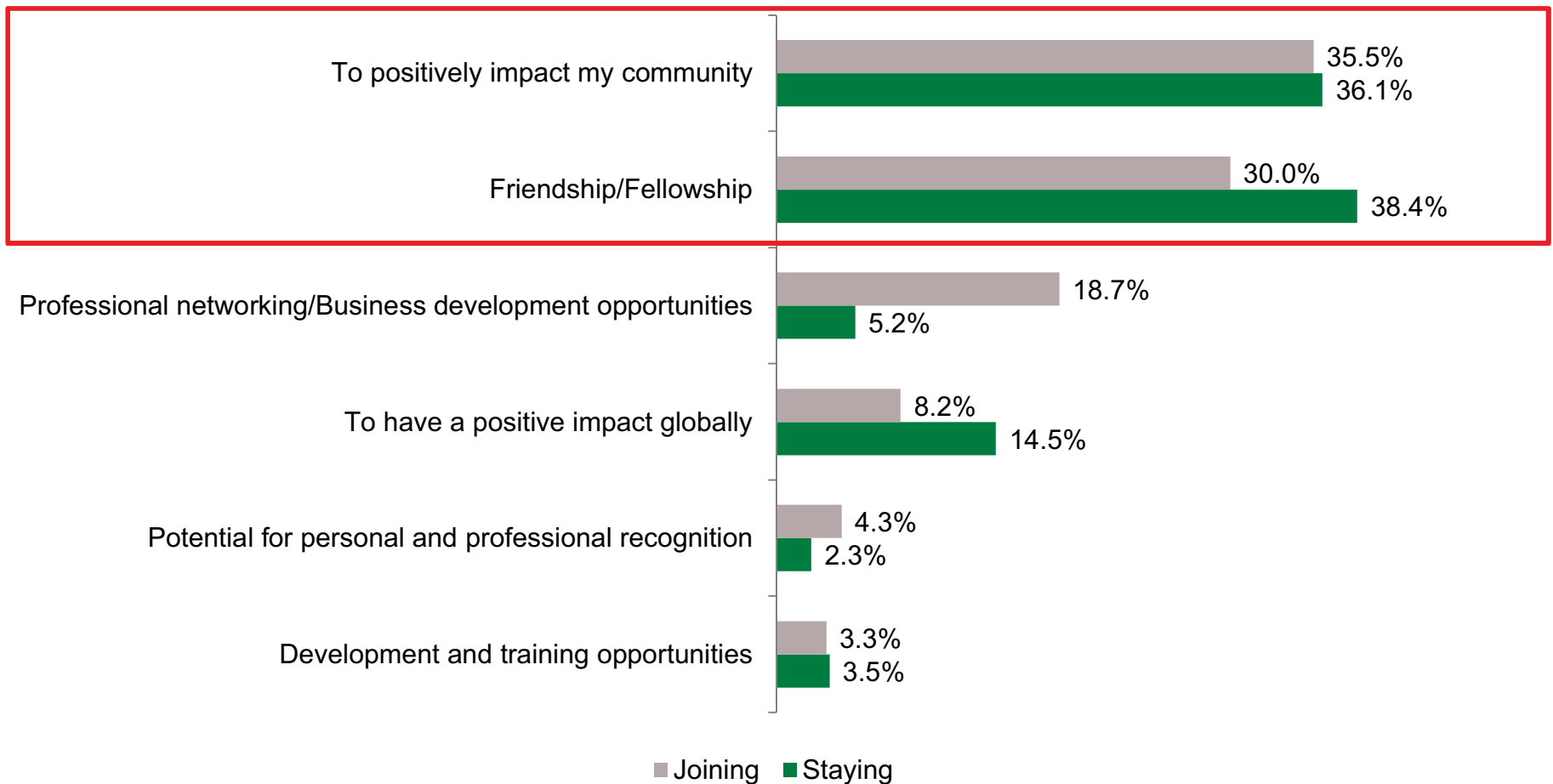
## Member engagement

**1**

**Join, and stay,  
to give back  
and be part of  
a community**

# Building friendships and contributing to the greater good are key

## Main reason for joining versus staying: Current Rotarians

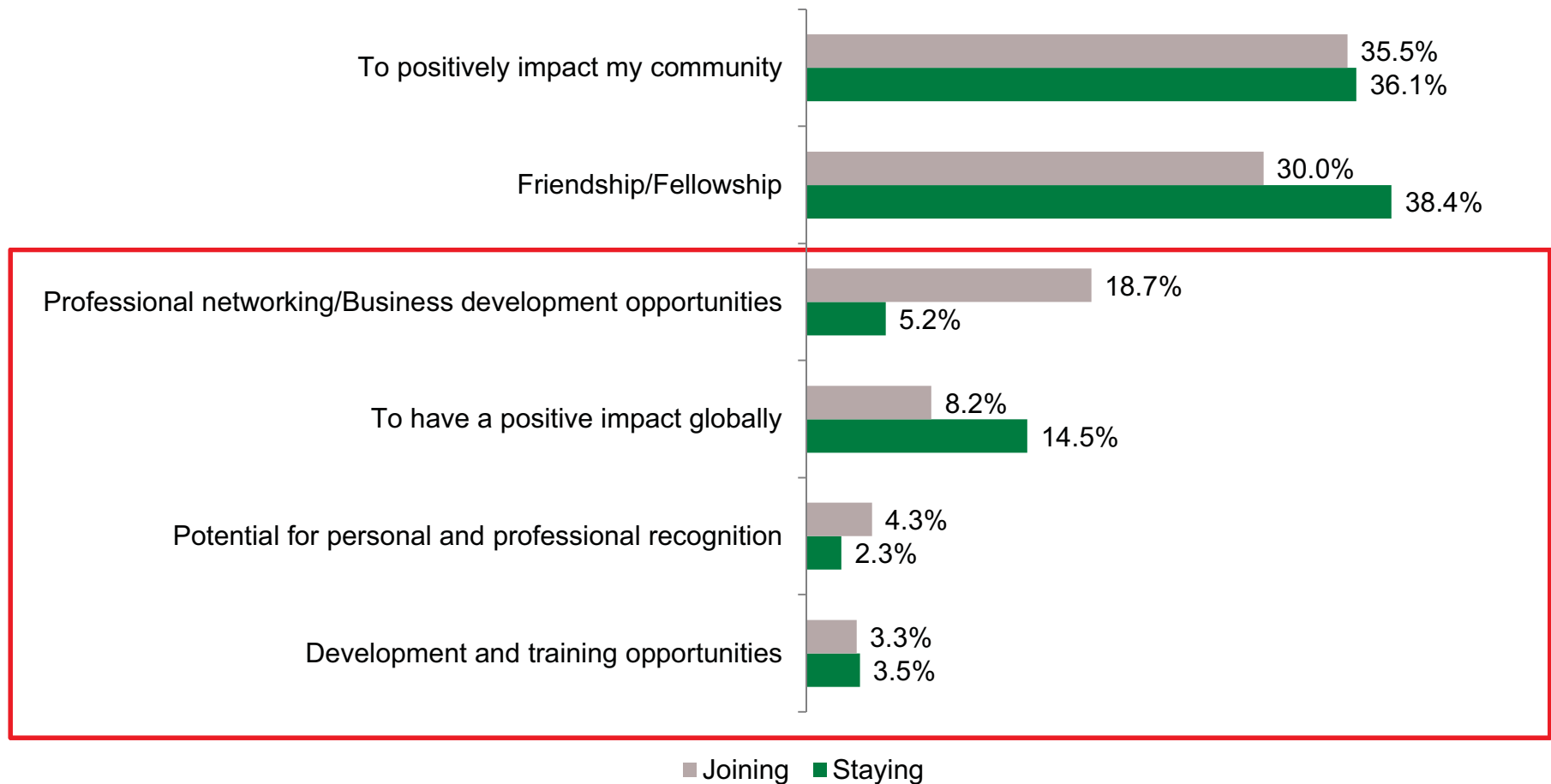


Q19: Which of the following best describes the reason you initially joined Rotary?

Q20: Which of the following best describes the main reason you have stayed with Rotary?

# More than professional development and networking

## Main reason for joining versus staying: Current Rotarians



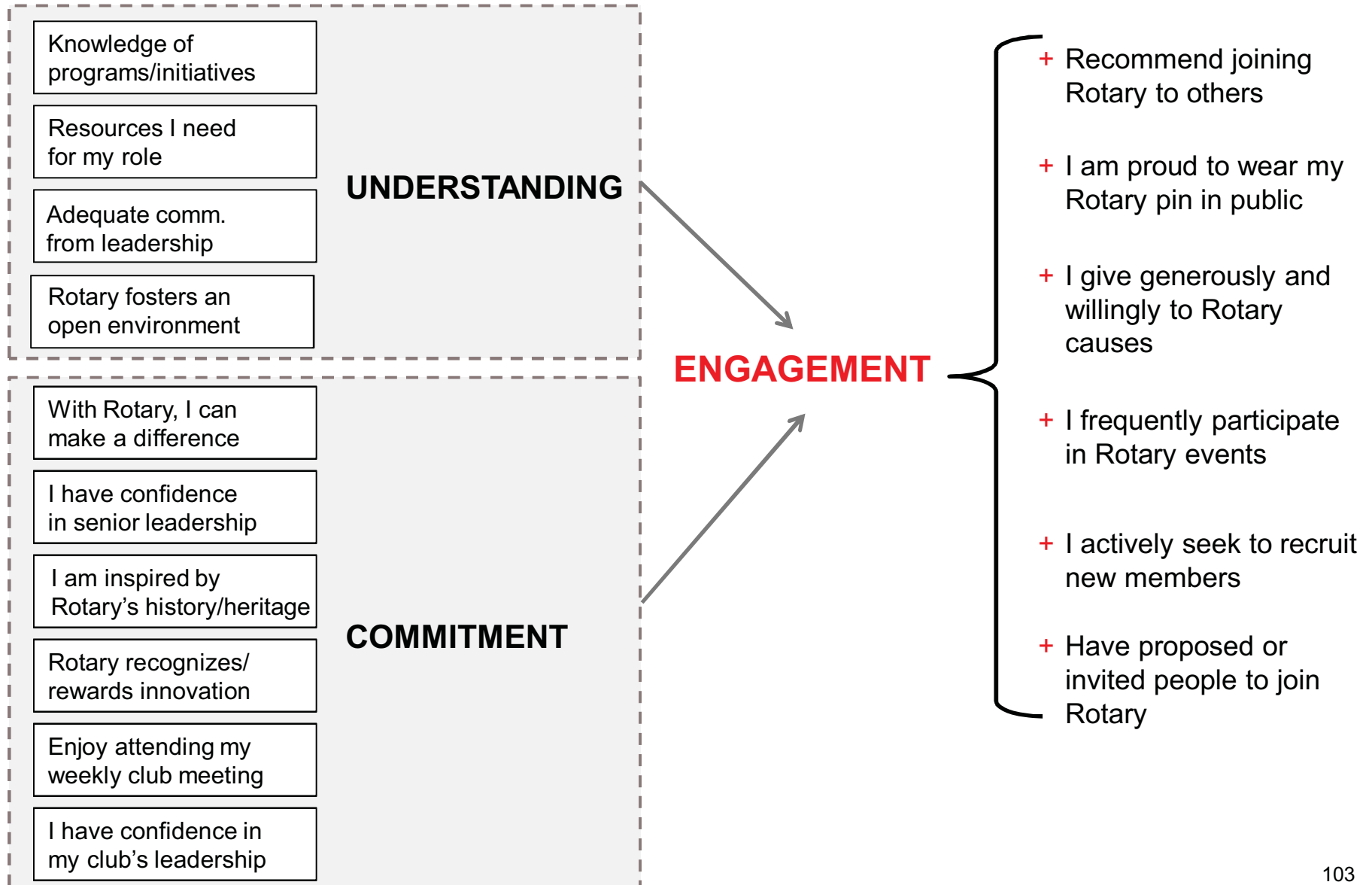
Q19: Which of the following best describes the reason you initially joined Rotary?  
Q20: Which of the following best describes the main reason you have stayed with Rotary?

## Member engagement

- 1. Join, and stay, to give back and be part of a community**

**2** **Want to be informed, empowered and inspired**

# Through knowledge and empowerment, you can convert Rotarians into a powerful network of promoters



## Member engagement

- 1. Join, and stay, to give back and be part of a community**
- 2. Want to be informed, empowered and inspire**

# 3

**While passionate about Rotary, Rotarians define the organization differently**



# 75% of Rotarians are Champions

## Stated Engagement Matrix: Current Rotarians

<p><b>Bystanders</b> Understand what the company stands for but are not committed to it <b>5.5%</b></p>	<p><b>Champions</b> Understand what the company stands for and are committed to it <b>75.4%</b></p>
<p><b>Weak Links</b> Have no knowledge/understanding of or commitment to what the company stands for <b>10.6%</b></p>	<p><b>Loose Cannons</b> Are committed employees but do not understand/know what the company stands for <b>8.5%</b></p>

## And view Rotary in a lot of different ways

Answers	% Selected (Current Rotarians)	
Provide service to others	69.0%	Rotary's Stated Goals
Fellowship	68.2%	
Promote high ethical standards/integrity	62.2%	
Improve health, support education and alleviate poverty	59.2%	
Advance world understanding and goodwill	59.1%	
Unite business, professional and community leaders to solve humanitarian issues	56.1%	
Advance world peace	42.4%	
Leadership	41.1%	
Support and strengthen clubs	37.4%	
Diversity	25.1%	
Provide immediate relief and aid to victims of natural disasters	36.1%	Fails
Create change through government advocacy	8.2%	
Find solutions to the most serious environmental challenges	15.8%	
None of the above	0.2%	

Q11: Which of the following statements accurately describes the main aspects of Rotary's purpose, goals and objectives?  
Please select all that apply.

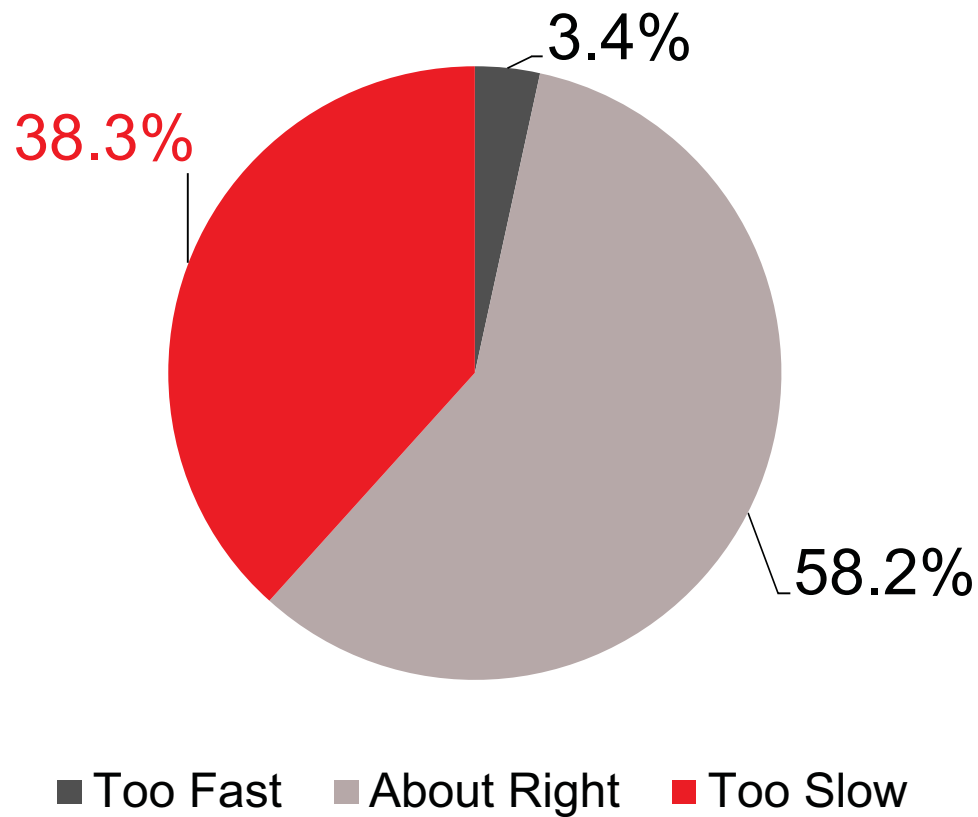
## Member engagement

- 1. Join, and stay, to give back and be part of a community**
- 2. Want to be informed, empowered and inspire**
- 3. While passionate about Rotary, Rotarians define the organization differently**

**4 Many welcome a redefinition of membership**

# Many Rotarians feel that Rotary is too slow to adapt

The pace of change at Rotary is...



# They see value in evolving the criteria for membership

## Impact on Rotary's future success



Q15: How could each of the following actions impact Rotary's future success?

# As long as it doesn't infringe upon human interactions

## Impact on Rotary's future success



Q15: How could each of the following actions impact Rotary's future success?

# Summary

## Audience motivators/barriers:

1. ■ Neither internal or external audiences understand what Rotary stands for
2. ■ Donors want to give to an organization that has a distinct approach, fosters personal connections and demonstrates impact
3. ■ Rotarians want to feel informed, empowered and inspired

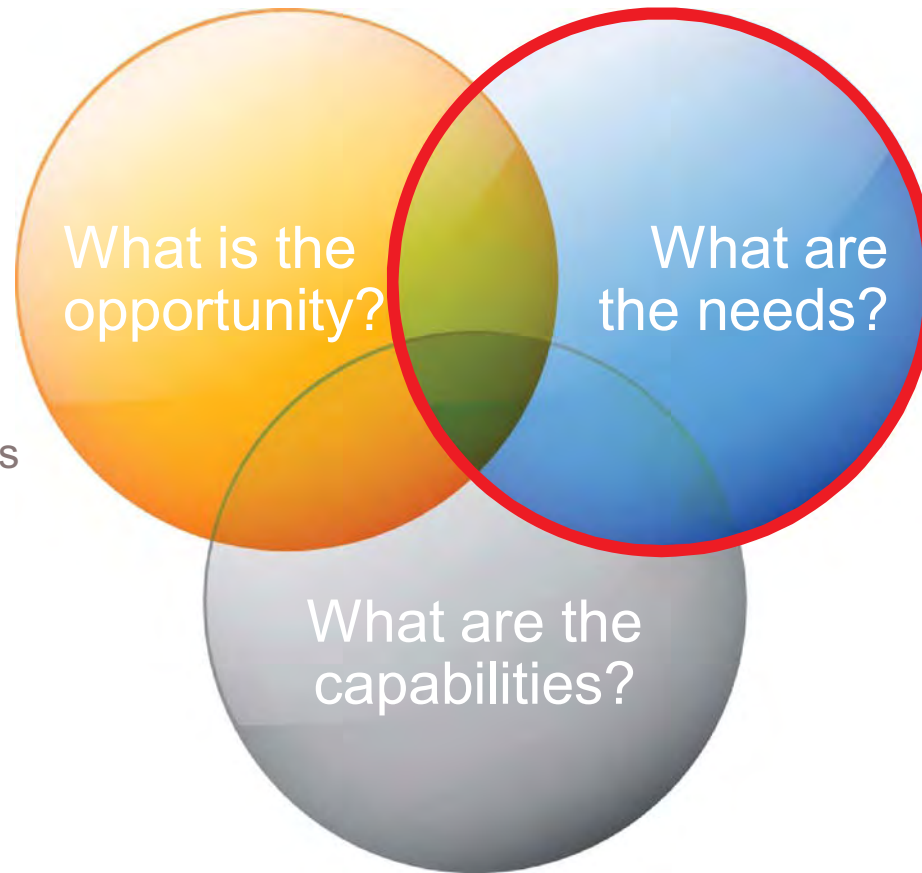
## Shared needs:

- + Have purpose
- + Do good
- + See results

# Audience insight

## Environment

Winning enterprises must unite an entrepreneurial approach, social aims and business results



## Organization

## Audiences

Shared needs:

- + Have purpose
- + Do good
- + See results





## STRENGTH 1

**A multidisciplinary  
perspective allows  
you to see challenges  
in ways others can't**

## The “classification principle” means you see differently



**“It is about what we can do together, how we can enrich each other...create energies, which we can put to good use.”**

*– Rotary leadership*

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**“I may work with architects and doctors and builders—and together we discuss the needs of the community.”**

*– Rotarian, Rotary Institute Kolkata*

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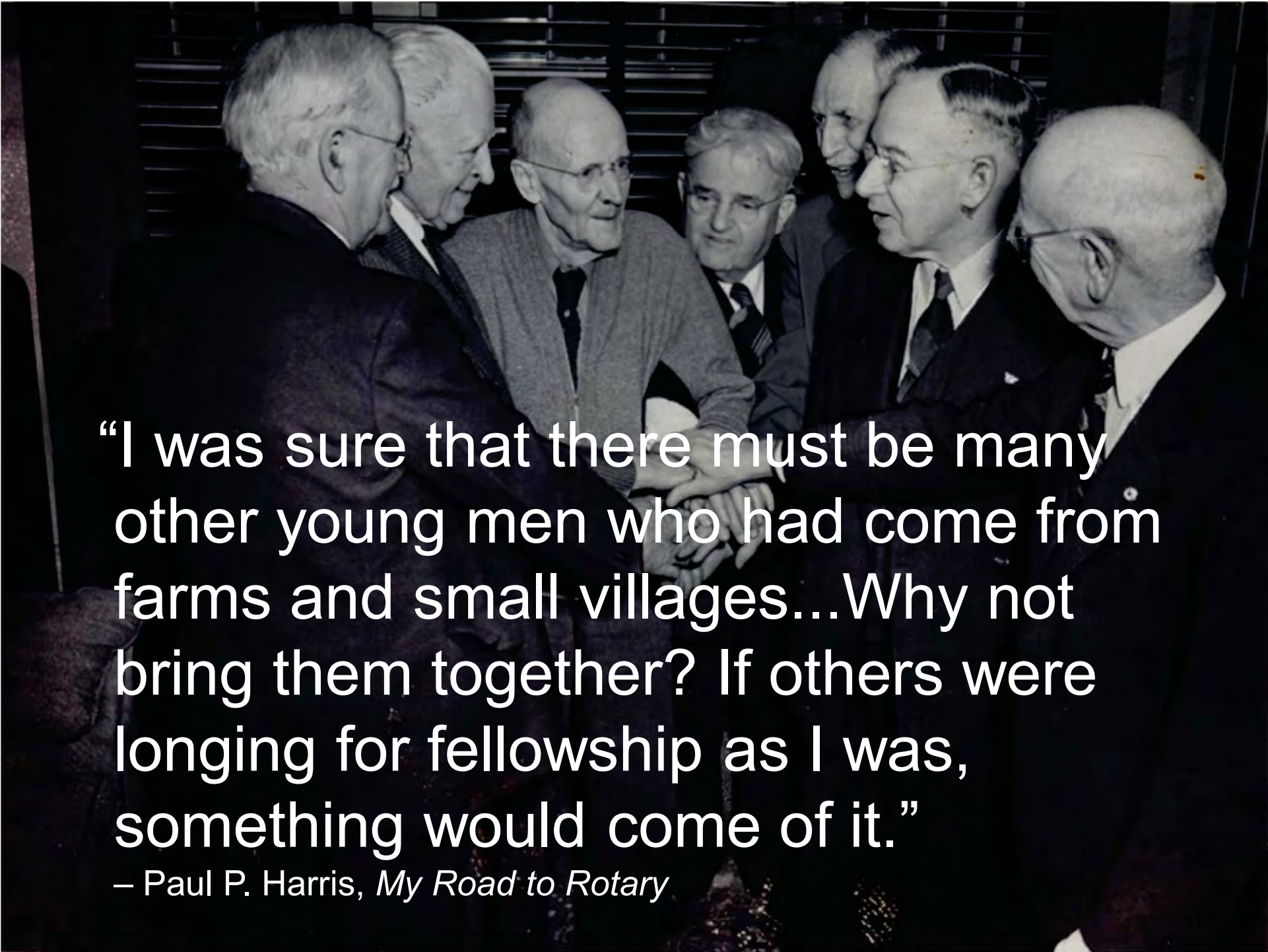
**“There is no other organization that stresses our classifications as opportunities for service.”**

*– Rotarian, Rotary Institute Mauritius*

---

## STRENGTH 2

**The ability to apply  
best-in-business  
thinking to social  
issues**



“I was sure that there must be many other young men who had come from farms and small villages...Why not bring them together? If others were longing for fellowship as I was, something would come of it.”

– Paul P. Harris, *My Road to Rotary*

# Rotary is, and always has been, a network of enterprising people



**“Good networking potential...to facilitate project identification, fundraising, management and execution.”** – *Rotarian, Rotary Institute Bali*



**“ Rotarians give back to society by using their professional skill and resources—be they networks and contacts or financial.”**  
– *Rotarian, Rotary Institute Bali*



**“Many members said one reason for joining Rotary was ‘building a trusted network of experts you can draw on if in need of specific support.’”** – *Rotarian, Germany*

## Bound together by shared values

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**“Rotary has made me a better person.  
The Four Way Test has helped me run a  
successful business and establish better  
relations with my constituents.”**

*– Rotarian, Rotary Institute Bali*

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**“When a Rotarian speaks, he’s considered a  
person with integrity and moral values and  
high ethical standards. That’s the reputation of  
Rotary in this part of the world.”** *– Rotary leadership*

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And a belief that, with great success, comes  
great responsibility

---



**“We say we joined to network, but  
we stayed to change the world.”**

*– Rotary leadership*

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**“We have so many people who have got  
everything they want, investing in something  
so few people invest in—the good of others.”**

*– Rotarian, Rotary Institute Kolkata*

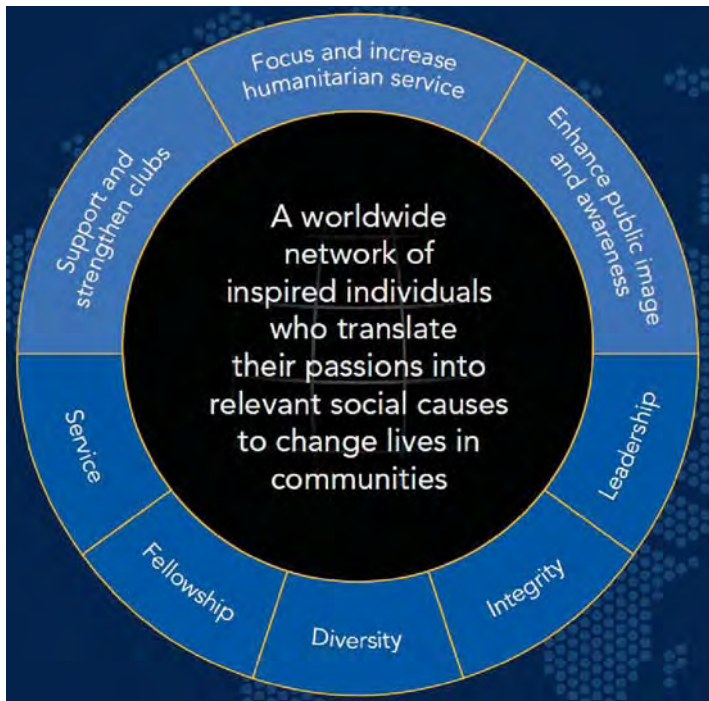
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In recent years, there has been an increased emphasis on service



**“Rotary is the only organization that advocates Service Above Self.”** – *Rotarian, Rotary Institute Bali*



Rotary Institute, Kolkata



San Francisco

But it is the intersection of business and service  
that sets you apart

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**“We are an international service organization based on international networking and not a charitable organization. We are selling time, context and expertise to innovate projects for the community.”** – *Rotarian, Rotary Institute Mauritius*

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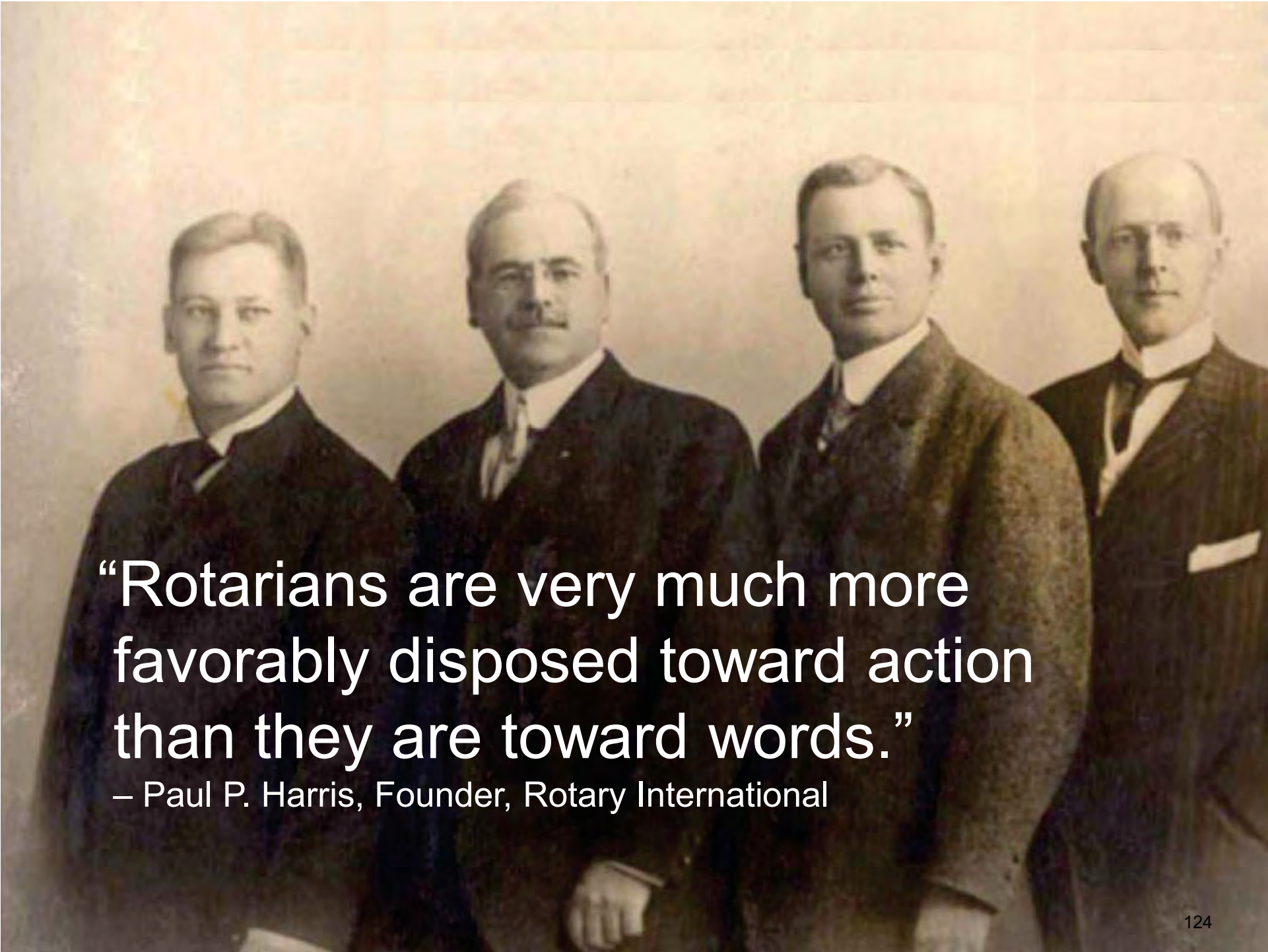


**“Rotarians are professional leaders that are resourceful, enterprising people with the right connections to make good things possible.”** – *Rotarian, Rotary Institute Kolkata*

---

## STRENGTH 3

**The passion and  
perseverance  
necessary for  
lasting change**



“Rotarians are very much more favorably disposed toward action than they are toward words.”

– Paul P. Harris, Founder, Rotary International

## Rotarians are tenacious in their quest to do good

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**“No one can fault them for their perseverance and resilience. They have had many disappointments along the way, but they keep innovating and changing their model.”**

*– Strategic partner*

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**“Someone from India would call me at 3 a.m. Chicago time to raise funds for his project. I admired the zeal and dedication of this guy.”**

*– Rotarian, Illinois*

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## STRENGTH 4

**The collective  
impact of our  
global community**

## Human connections are the foundation of Rotary

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**“Fellowship and Service are twin pillars. We forget fellowship, but that is what leads to everything else—service, family values, international service, etc.”**

*– Rotarian, Rotary Institute Kolkata*

---



**“It all starts at the club. I go to meetings, see friends and we have an impact on our community. The more you get involved, the more your community continues to expand.”**

*– Rotary leadership*

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## Creating a vast network that makes global impact possible



**“The international network makes projects all over the world possible.”** – *Rotarian, Rotary Institute Bali*



**“The connections are amazing. If there are 6 degrees of separation, Rotary cuts it down to 4. I can get to the Pope in 2 moves in 2 different directions.”** – *Rotarian, Rotary Institute Palm Springs*



**“We are in the community, we can make a phone call. You want to know what is happening in Ethiopia, I can make a phone call and find out right away.”** – *Rotarian, Rotary Institute Palm Springs*



You have the strengths necessary for greatness

**A multidisciplinary perspective allows you to see challenges in ways others can't**

**The ability to apply best-in-business thinking to social issues**

**The passion and perseverance necessary for lasting change**

**The collective impact of our global community**

**Now you need to focus them around an even bigger unifying idea**

You have the strengths necessary for greatness

**A multidisciplinary perspective allows you to see challenges in ways others can't**

→ **See differently**

**The ability to apply best-in-business thinking to social issues**

→ **Think differently**

**The passion and perseverance necessary for lasting change**

→ **Act tenaciously**

**The collective impact of our global community**

→ **Impact globally**

# Summary

## Four core strengths:

1. A multidisciplinary perspective allows you to see challenges in ways others can't
2. The ability to apply best-in-business thinking to social issues
3. The passion and perseverance necessary for lasting change
4. The collective impact of our global community

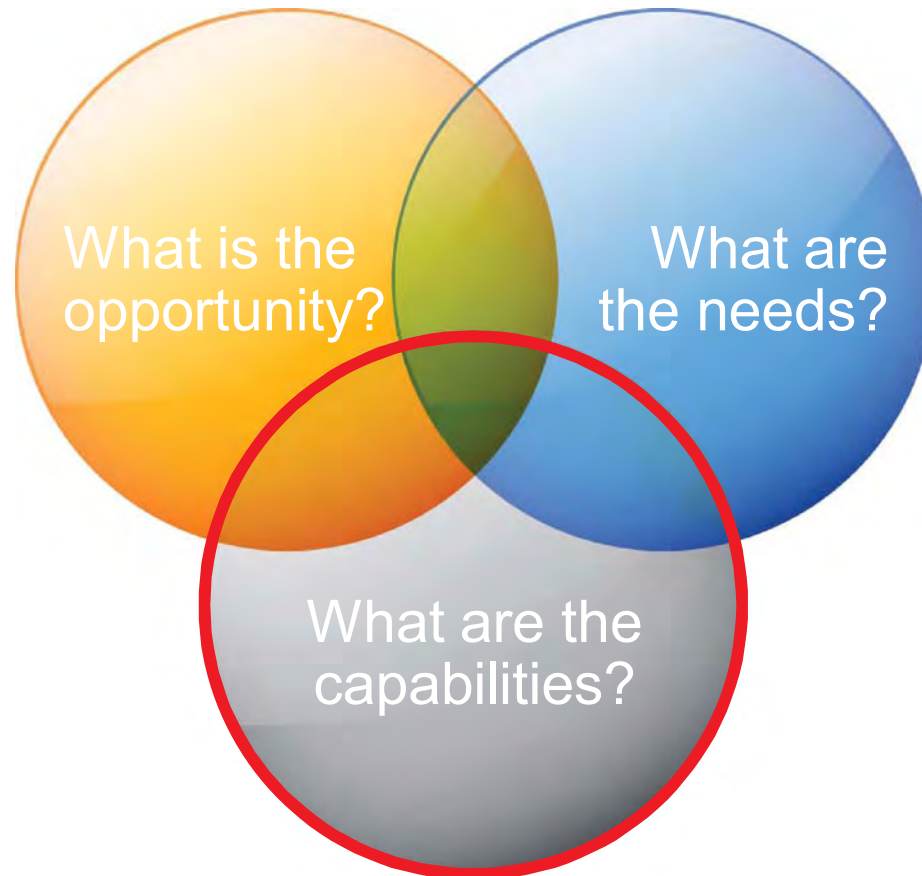
## Unique ability to:

- + See differently
- + Think differently
- + Act tenaciously
- + Impact globally

# Organization insight

## Environment

Winning enterprises must unite an entrepreneurial approach, social aims and business results



## Audiences

Shared needs:

- + Have purpose
- + Do good
- + See results

## Organization

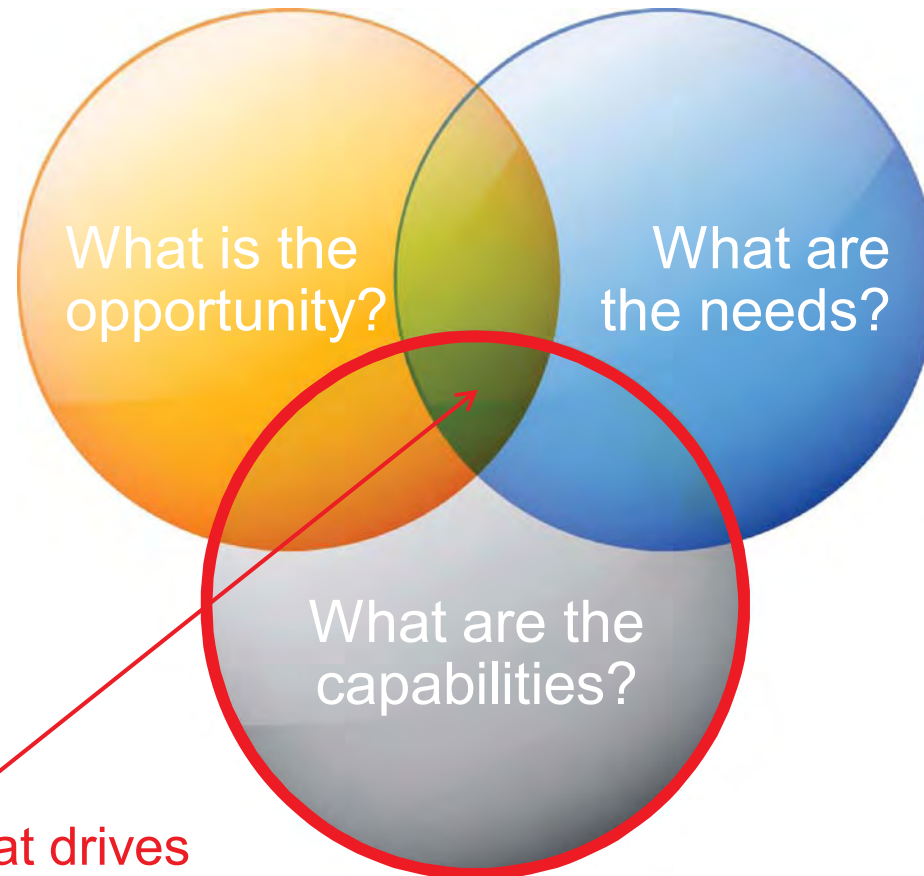
**A unique ability to:**

- + See differently
- + Think differently
- + Act tenaciously
- + Impact globally

# Developing the core insight

## Environment

Winning enterprises must unite an entrepreneurial approach, social aims and business results



## Audiences

Shared needs:

- + Have purpose
- + Do good
- + See results

Core insight that drives the development of the strategic platform

## Organization

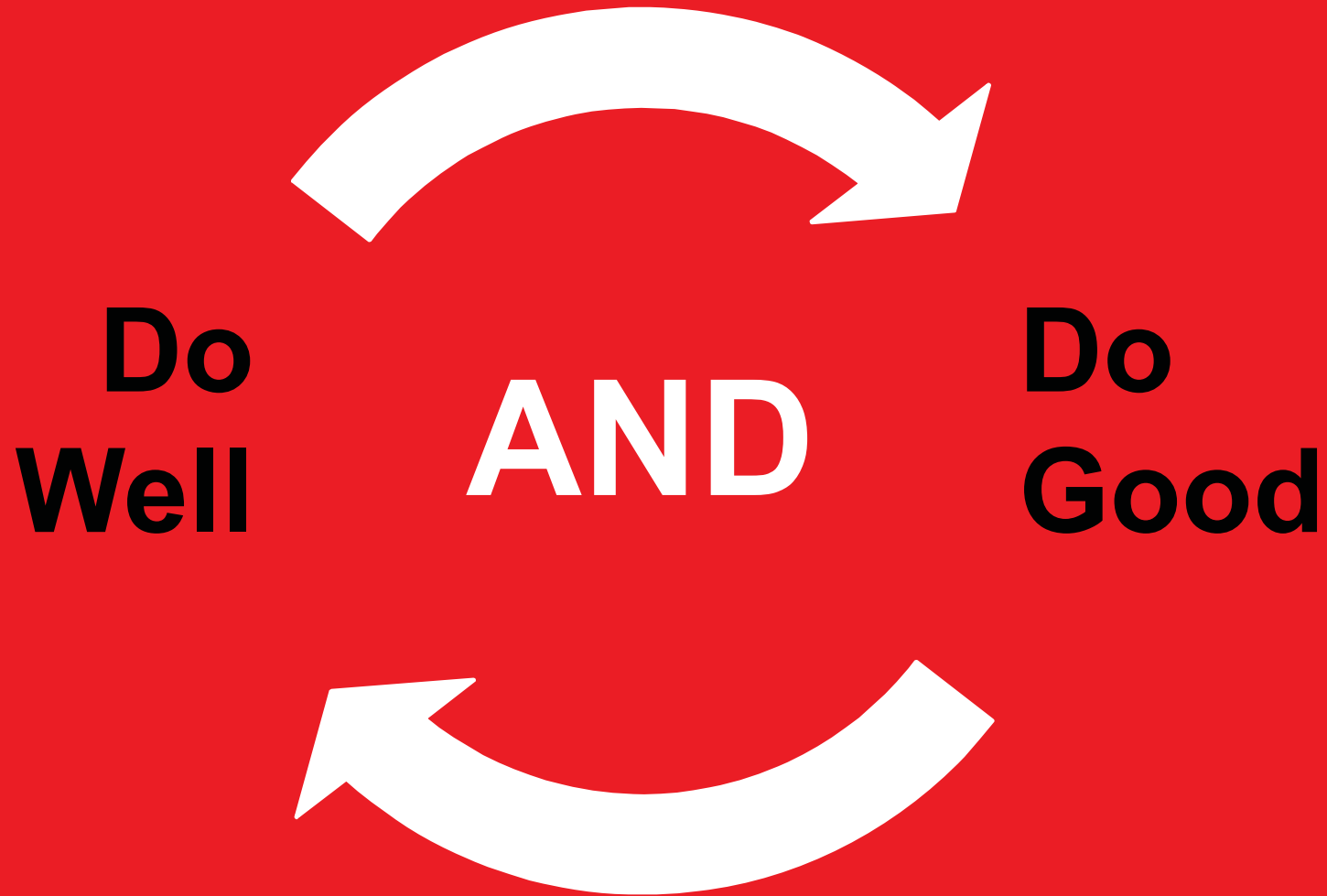
**A unique ability to:**

- + See differently
- + Think differently
- + Act tenaciously
- + Impact globally

Core insight

**Rotary has the unique ability to connect commerce and cause...doing so will elevate the organization's reputation, relevance and impact.**

Creating a self-perpetuating cycle of positive impact



# Agenda

Overview

Current Situation

Building the Story

**Implications**

Discussion

Next Steps



Initial statement of purpose

**Enterprising minds  
connecting for good.**

Initial statement of purpose

**Enterprising minds  
connecting for good.**

Speaks to business and professional expertise; conveys an innovative, independent and persevering spirit; demands action

Initial statement of purpose

# **Enterprising minds connecting for good.**

Celebrates the diverse perspectives;  
elevates the conversation from money  
raised to expertise applied

Initial statement of purpose

**Enterprising minds  
connecting for good.**

Speaks to the importance of actively fostering personal relationships at Rotary...at both the individual and global levels

Initial statement of purpose

**Enterprising minds  
connecting for good.**

Speaks to the enduring connections  
as well as positive and sustainable  
change you bring to your communities  
around the world

**So what could we do  
with this statement  
of purpose?**

**Everything.  
(but not all today...)**





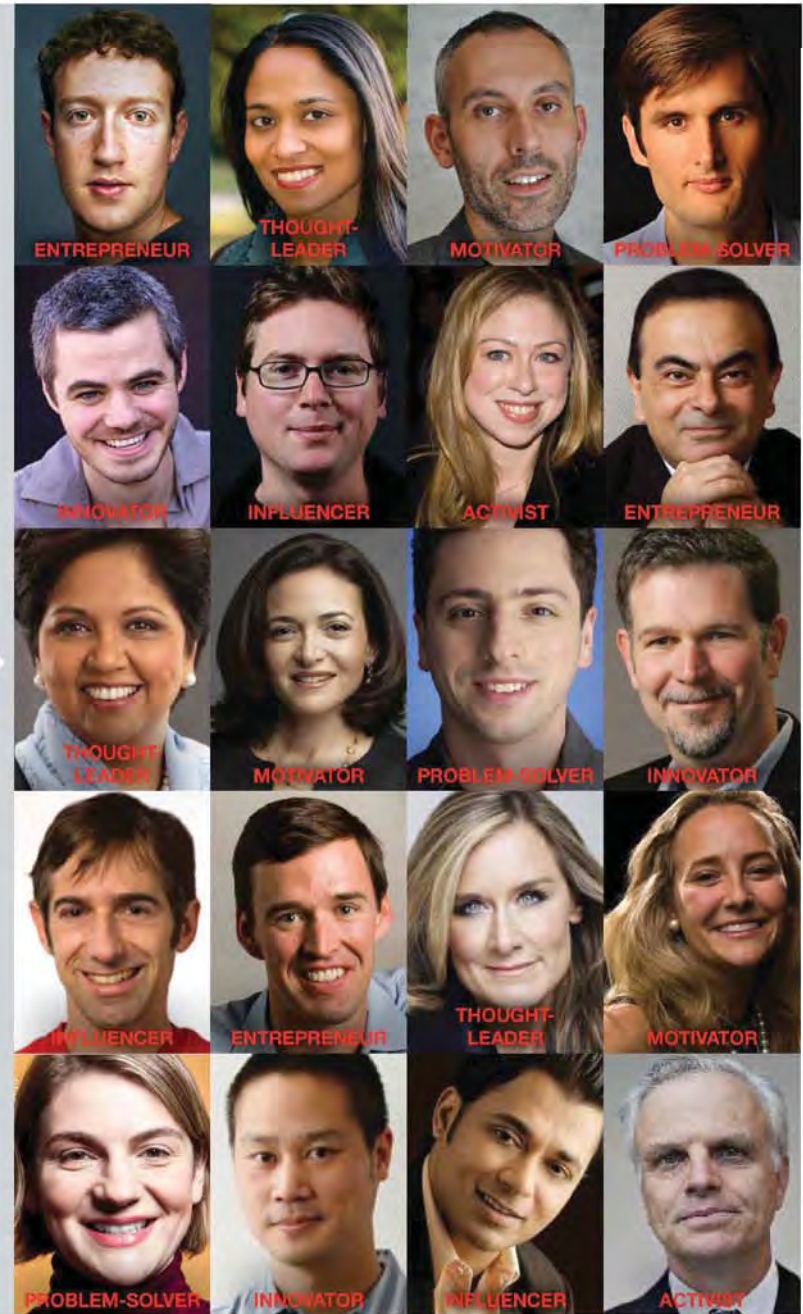












Culture > Membership Criteria

Note: Demonstrations for discussion only







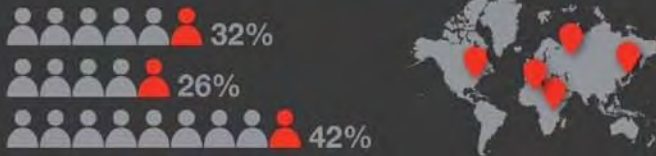


## Water and Sanitation

The Water and Sanitation Rotarian Action Group announced a partnership to bring 5 million gallons of clean water, along with sanitation and hygiene education, to 30 schools in Malawi and Tanzania during its fourth World Water Summit on 20 May.

Progress Report Card:

\$142,000,000 RAISED    PENDING    GOAL



3,642 86 41 12mil

PROJECTS FUNDED    COUNTRIES    LOCAL PARTNERS    LIVES AFFECTED

LOREM IPSUM

LOREM IPSUM



GALLERY



# Summary of implications

## From:

NGO model

Attracting business and professional leaders

Money raised

Process driven

Targeting demographics

Embracing all issues

Legacy organization

## To:

Social enterprise model

Applying best-in-business thinking to social issues

Impact yielded

Strategy driven

Targeting psychographics

Prioritizing systemic issues

Powerhouse of social innovation and impact

# Agenda

Overview

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**Discussion**

Next Steps

**Enterprising minds  
connecting for good.**

# Enterprising minds connecting for good

## Criteria for evaluation and discussion

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### **Is it clear?**

Is the statement simple and easy to understand?

---

### **Is it credible?**

Is it believable coming from Rotary?

---

### **Is it compelling?**

Is it relevant to and resonant with Rotary's internal and external audiences?

---

### **Is it differentiating?**

Is it distinctive relative to peer organizations?

# Agenda

Overview

Current Situation

Building the Story

Implications

Discussion

**Next Steps**

# Project overview

1

Research  
and  
Analysis

18 Weeks

2

Strategy,  
Messaging,  
Organization  
Implications

16 Weeks

3

Brand  
Architecture

8 Weeks

4

Visual  
Identity

16 Weeks

5

Guidelines

4 Weeks

6

High-level  
Implementation  
Plan

4 Weeks



# Current Phase

# 1

Research  
and  
Analysis

Kickoff Meeting



EyeOpener™ Quantitative  
Research Study

+ 400+ Current

+ 320 Prospective Donors

+ 14 Countries



Audits

+ Strategic materials, existing  
research and communications  
review

+ Competitive and best practices  
review



EnGage™  
(Global Member Survey)

+10,612 respondents

+167 countries



Club Visits

+ 20 club visits in 9 cities across  
6 countries



Key Findings Presentations



Institute Meetings

+ 5 meetings

Internal and External  
Interviews (150+)

+ Internal stakeholders, current  
members and donors

+ Prospective members

+ Prospective donors

+ Partners

+ General public



# Next steps

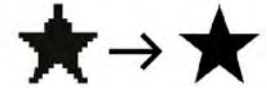
## 2

Strategy,  
Messaging,  
Organization  
Implications

Strategy Platform  
Development and  
Business Implications



Refinements to Selected  
Direction



Core Team and Leadership  
Team WebEx Work Session



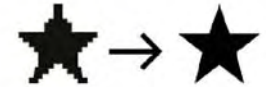
High-level Messaging



Validation/Projected ROI  
Research with Current and  
Prospective Members and  
Donors



Refinements



+ 400 prospective members and  
donors  
+ 1,600 current members

Final Presentations



Core Team and Leadership  
Team Work Session



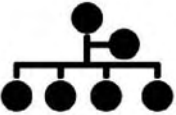

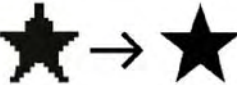

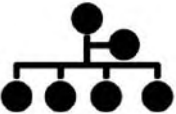
Final Strategy Platform



# Next steps

# 3

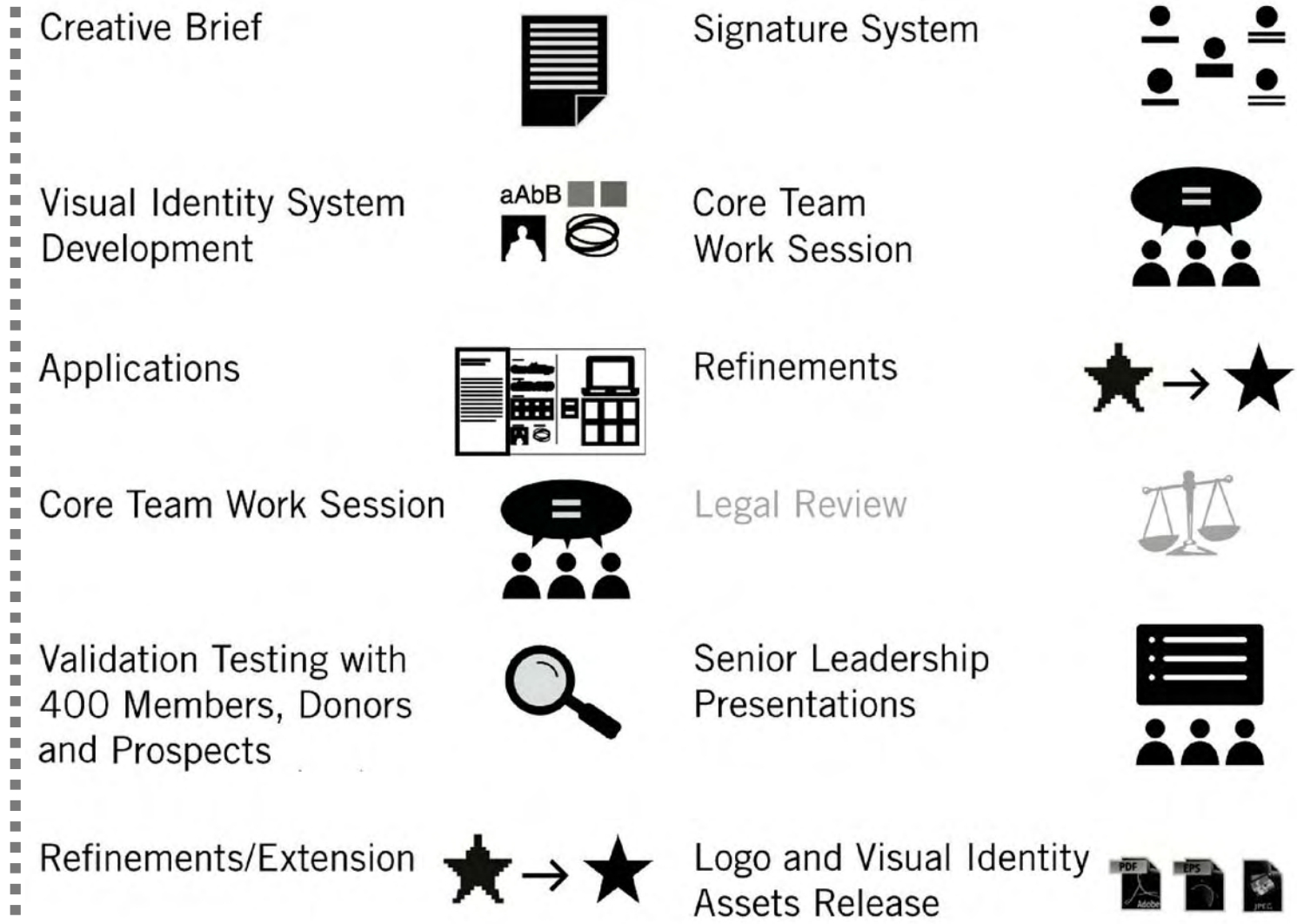
Brand Architecture

- Brand Architecture Development
  - + Current brand architecture mapping
  - + Model development
- Core Team Work Session
- Refinements to Selected Model
- Core Team/Senior Leadership Presentations
- Final Architecture Model

# Next steps

# 4

Visual Identity



# Next steps

# 5

Guidelines



# Next steps

# 6

High-level  
Implementation  
Plan



Implementation and  
Rollout Planning Work  
Session and Plan  
Development



Training



+ siegel  
gale

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simple is smart