

# The Cadre & Rotary's Action Plan

March 2025

The Rotary Foundation Cadre of Technical Advisers



# WELCOME

Meeting will be **recorded**

Interpretation available

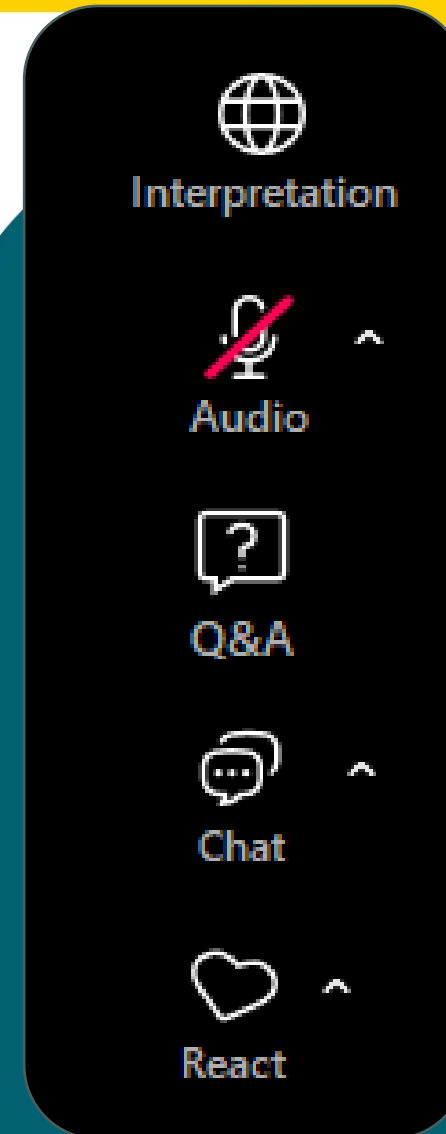
- Use **globe** icon to select language  
(including English)

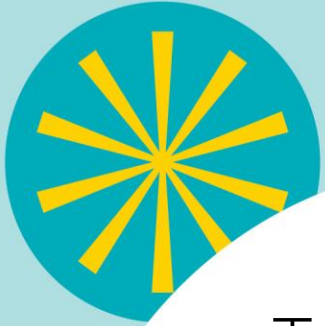
**Mute** your microphone

Use **Q & A** for questions

**Chat** and **React**

Have your phone or web browser  
ready for joining the Slido!





# LEARNING OBJECTIVES

To improve Cadre members' understanding of:

- Rotary's Action Plan and what we're learning from it
- How the Cadre is helping accomplish the Action Plan
- Available Action Plan resources





## Why we're learning about this

Feedback from Cadre members

Carry forward Cadre Long-Term Plan (2020-22) priorities

Next five-year cycle starts 1 July

Be effective and aligned

Explain how we add value and contribute



# Megan Anderson

## Director of Strategy



# THE ACTION PLAN



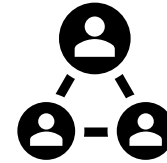
## Informed by:

- Members
- Participants
- Partners



## To help address:

- Critical issues
- Key opportunities



## For use by:

- Members
- Clubs
- Districts
- Rotary International

# THE ACTION PLAN HELPS ADDRESS *Challenges and Opportunities*



Adapting to a changing world



Keeping up with rapid technological change



Remaining relevant and strong well into the future



Capturing people's attention in an increasingly complex world



Assessing the implications for Rotary in a post-polio world

# Strategic Planning

Our Strategic **Priorities** are the key focus areas within the Action Plan. Each priority reflects the input and feedback of current and former members, leadership, program participants, and Rotary staff.

Our Strategic **Objectives** are critical elements that must be delivered for Rotary to achieve its strategic priorities. They are broad and long-term and also provide a bridge from our vision and priorities to strategies we can execute.

Our Strategic **Initiatives** are actionable efforts, above the level of specific tactics, that guide Rotary's execution of strategy. They are cross-functional, multi-year efforts designed to drive progress towards our strategic objectives.







## 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 ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

## ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill building

## INCREASE OUR ABILITY TO ADAPT

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

# INCREASE OUR IMPACT

*Define, measure, track, and analyze data from service projects to measure our outcomes, improve project quality, and create lasting change.*

Objectives:

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



# INCREASE OUR IMPACT

## Why Impact?

Current and potential partners, participants, and donors want to trust in the stewardship of the organizations they join, support, and engage with. By showing proof of the impact we make, participants can be assured their donations and volunteer time are well spent.



# EXPAND OUR REACH

*Develop new and inspiring ways to engage with Rotary to welcome diverse Rotary participants and unite them in taking action.*

## Objectives:

- Grow and diversify our membership and participation
- Create new ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand



# EXPAND OUR REACH

## Why Reach?

When we create new ways to bring people to Rotary, welcome more people from all backgrounds as participants, partners, and members, and share our values with new audiences, we'll improve our capacity to create lasting change.





# ENHANCE PARTICIPANT ENGAGEMENT

*Create new ways to inspire participants and provide valuable experiences that make them want to stay.*

Objectives:

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill-building



# ENHANCE PARTICIPANT ENGAGEMENT

## Why Engagement?

When participants don't find experiences personally or professionally fulfilling, they go elsewhere. By assessing what we offer and looking for ways to create additional value, we can give members and participants a reason to stay.



# INCREASE OUR ABILITY TO ADAPT

*Make Rotary's operating and governance structures more efficient, representative, flexible, and effective while exploring new opportunities through innovation, evidence, and educated risks.*

## Objectives:

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





# INCREASE OUR ABILITY TO ADAPT

## Why Adapt?

We need to recognize that changing demographics, technologies, and trends also mean the opportunities before us are changing as well. We need to take steps to create a strong foundation for innovation, sustainability, and growth.





## ADAPTING TO A CHANGING WORLD

- Dynamic **external conditions**
- Increased competition for people's **time** and attention
- Evolving needs of our members
- Evolving needs of participants
- Implications for a post-polio world
- Consider **Rotary's position** and competitive advantage relative to **market trends** as well as global trends in volunteerism, **membership**, **charitable causes**, and humanitarian service

# ADAPTING TO A CHANGING WORLD



Rotary Members



General Public



Rotary  
Participants



# THE RESEARCH

- **2024 Rotary Action Plan Survey:** An understanding of the Action Plan's effectiveness, importance, and relevance for members and clubs.
- **2024 Rotary Participant Survey:** An understanding of how participants who have never been Rotary or Rotaract members perceive the organization.
- **2024 General Interest Survey:** An understanding of our strengths and relevance in the nonprofit and membership market as well as the public's engagement with and interest in volunteer groups and service organizations.



# KEY FINDINGS - MEMBERS

- Awareness of the Action Plan has increased significantly
- The convention is an effective opportunity to spread awareness of the Action Plan
- Rotarians and Rotaractors agree that it is important to have a process for implementing the Action Plan
- Members agree that the Action Plan is moving the organization in the right direction and that the four priorities are important
- The Action Plan is relevant for members, particularly for women and younger members
- However, there has been minimal change in club usage of the Action Plan since 2020





# KEY FINDINGS - MEMBERS

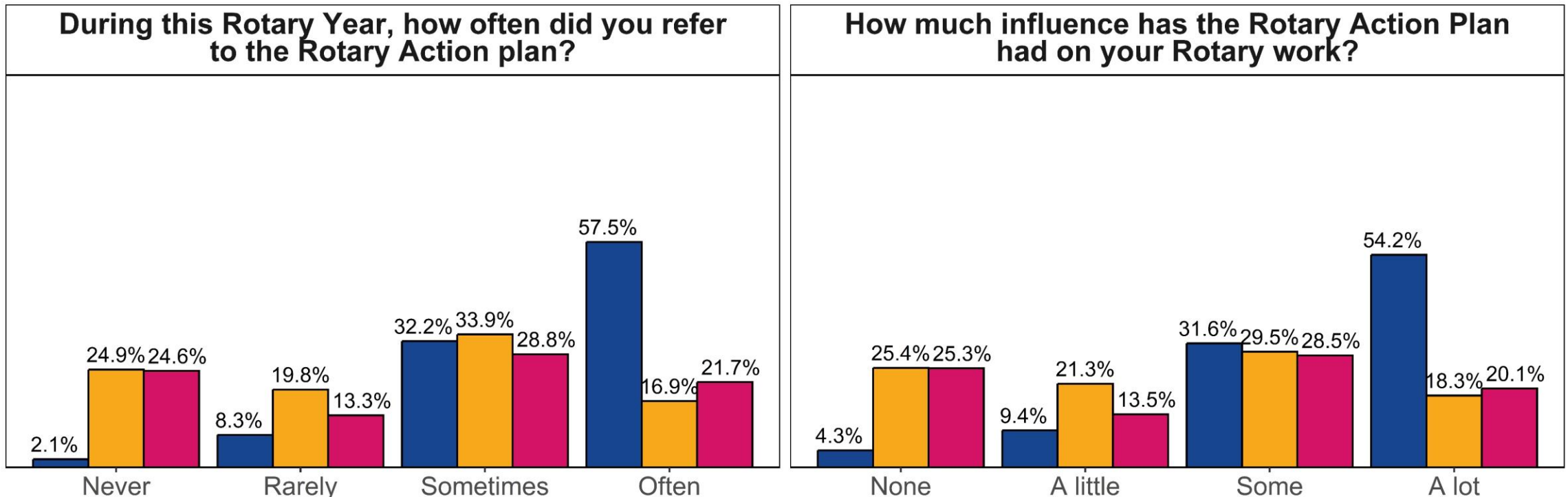
- Regions with higher engagement with the Action Plan also see higher growth
- Participant engagement continues to be the most important priority
- Greatest positive effects are **leadership effectiveness** and a **club's ability to design impactful projects**
- Growing regions see a **very positive effect on new member recruitment and member retention**
- Areas for improvement include:
  - Flexibility
  - Responsiveness to ideas from members
  - Increased communications particularly with Rotaractors



# Action Plan: Reference & Influence

According to results from the 2023 Rotary Leadership Survey, District Governors are referring to the Action Plan the most. The Action Plan is also having the largest influence on District Governors.

■ District Governors ■ Rotary Club Presidents ■ Rotaract Club Presidents



# Action Plan: More Leader Findings

How many district and clubs are using the Action Plan with their strategic plan? According to results from the 2023 Rotary Leadership Survey:

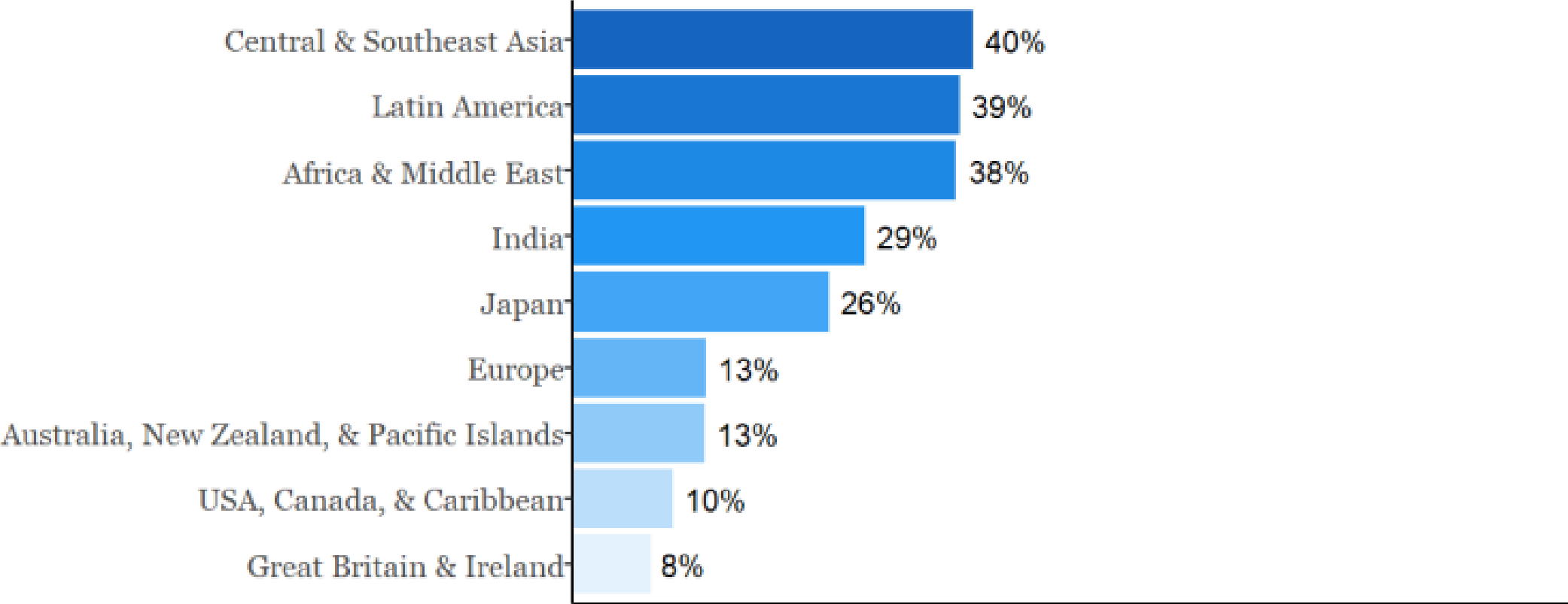
- 82.2% of Districts
- 48.3% of Rotary clubs
- 45.9% of Rotaract clubs

Leader	% Have Strategic Plan	% Align Club Plan with Action Plan	% Don't know about the Action Plan
District Governors	87.8%	93.7%	0.6%
Rotary Club Presidents	72.2%	66.9%	11.9%
Rotaract Club Presidents	74.7%	61.5%	20.0%



# Usage of the Action Plan in Rotary Club Activities, by SubContinent

Percentage of Rotarians who were familiar with the Action Plan by percentage who said their club used the Action Plan, 2024 Rotary Action Plan Survey

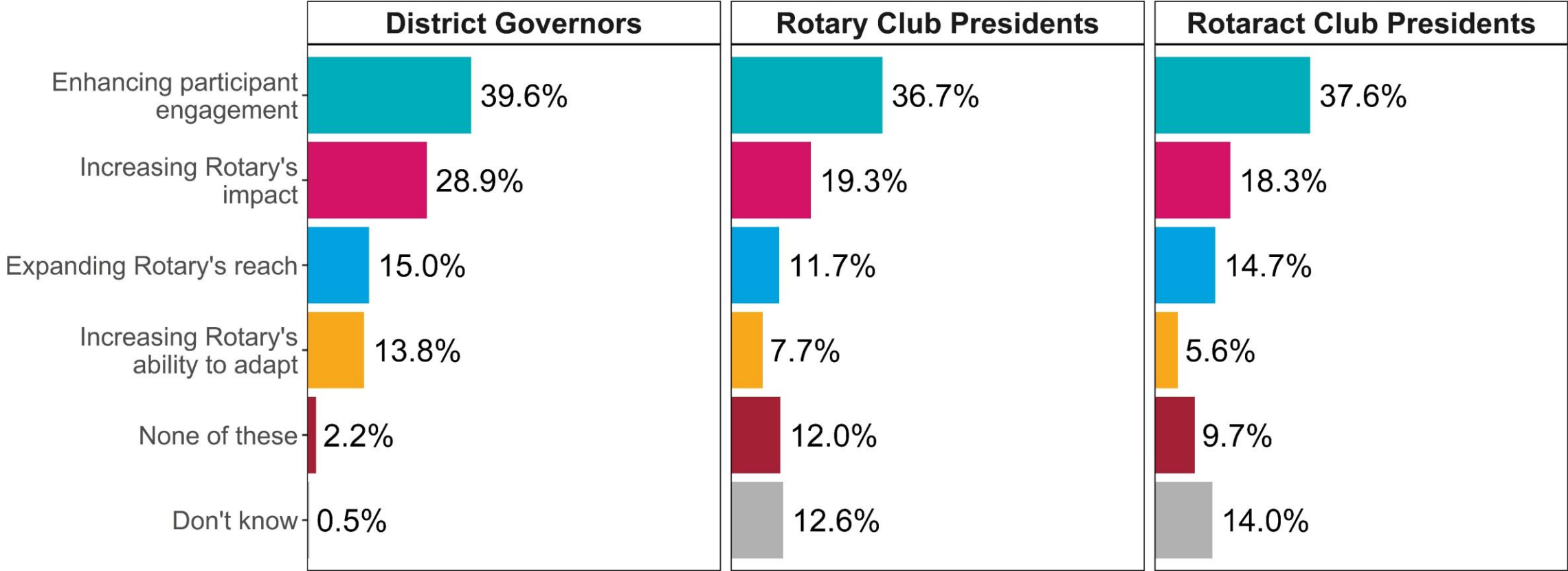


Korea removed due to lack of responses.

# Action Plan: Most Important Priority For Leaders

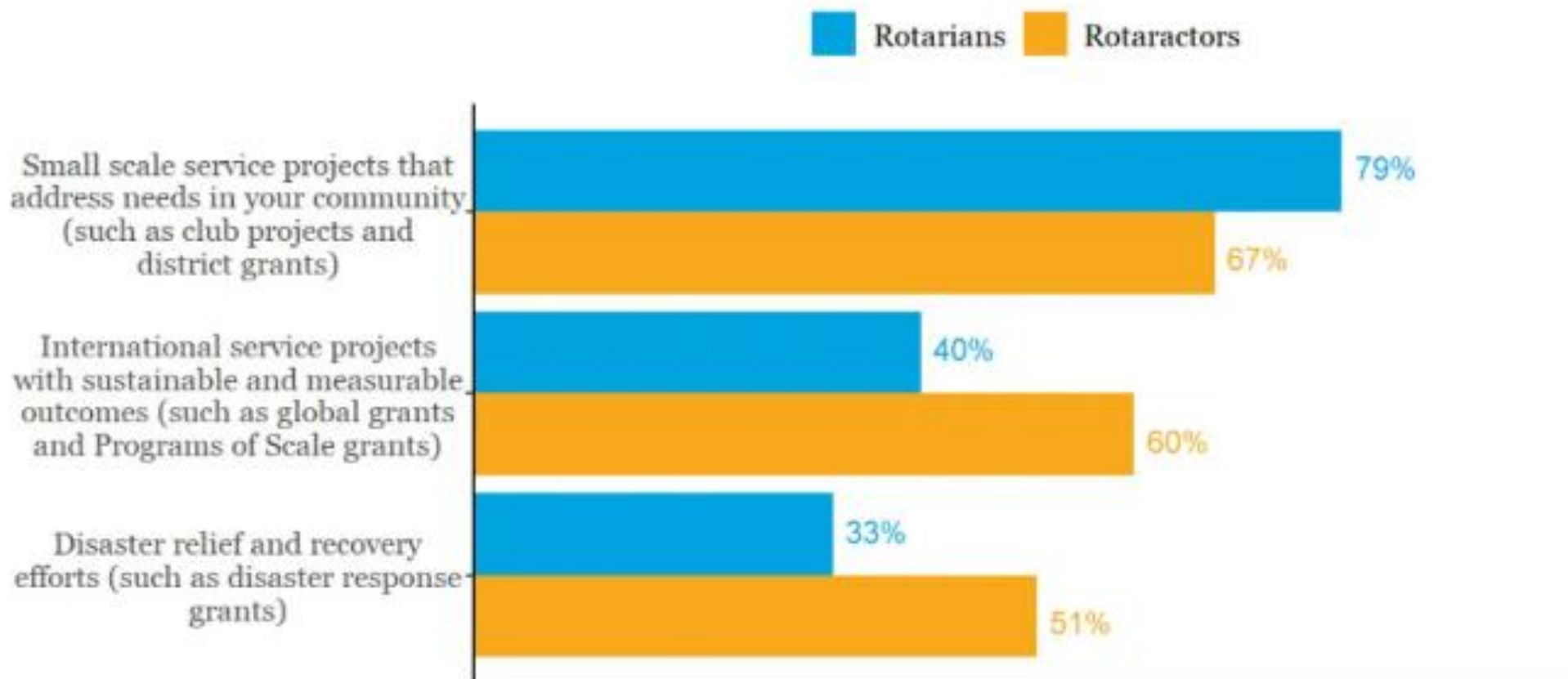
**Which Rotary Action Plan strategic priority has been most important for your Rotary work?**

2023 Rotary Leadership Survey



## Which of these types of service projects do you prefer to work on?

Rotarians and Rotaractors, 2024 Rotary Action Plan Survey



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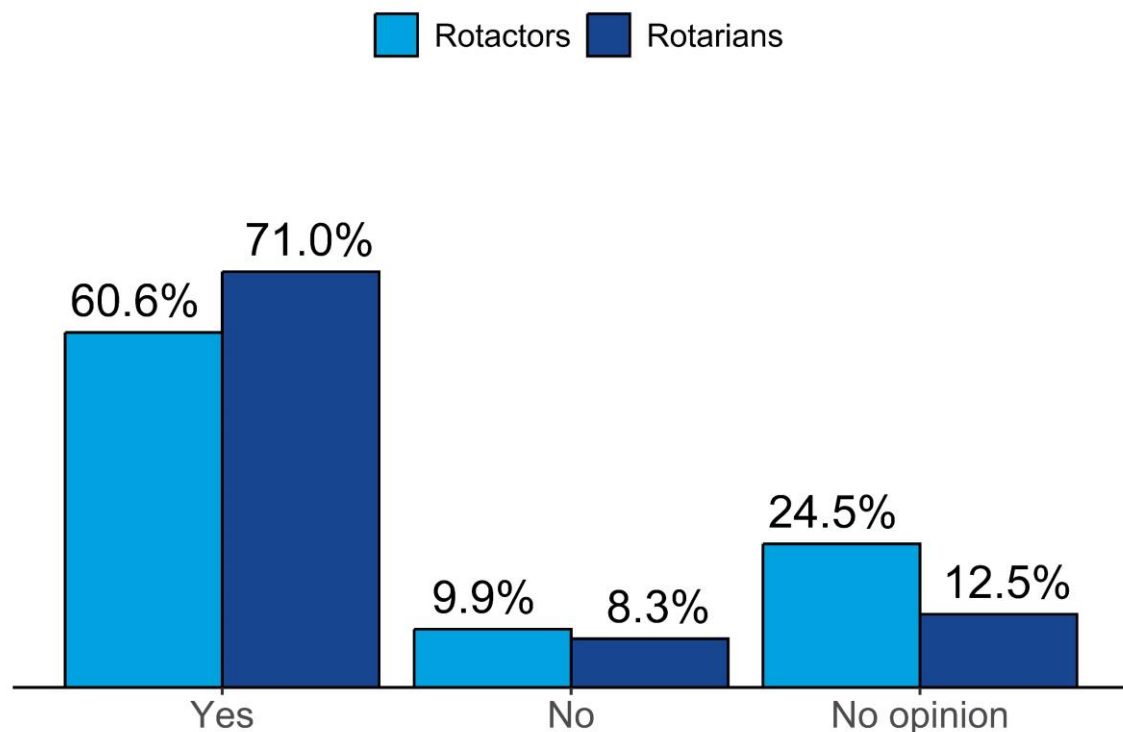
Rotarians by SubContinent, 2024 Rotary Action Plan Survey

	Disaster relief efforts	International service projects	Small scale service projects
Africa & Middle East	36%	62%	71%
Australia, New Zealand, & Pacific Islands	40%	34%	83%
Central & Southeast Asia	49%	55%	71%
Europe	22%	33%	80%
Great Britain & Ireland	43%	39%	92%
India	40%	58%	71%
Japan	41%	32%	73%
Latin America	32%	40%	72%
USA, Canada, & Caribbean	28%	34%	87%

# After Polio Is Eradicated

## After polio is eradicated, should Rotary have a project or cause as its corporate focus?

A majority of members want a corporate cause after polio is eradicated.



## Which cause or project do you think Rotary should adopt as its corporate focus after polio is eradicated?

Rotarians and Rotaractors, wordcloud based on number of responses word appeared in.



# KEY FINDINGS - PARTICIPANTS

- Experiences with Rotary were enjoyable and had positive effect
- Mixed perceptions: elitist to inclusive, fun to out of touch
- Despite positive interactions, not interested in joining a club
- Prefer limiting further Rotary engagement to volunteering opportunities
- If joining a club, would seek one that could achieve their service goals, provide skill-building, and has open membership



# PARTICIPANTS

Experience Beyond the Club

- **Participants** who responded to the survey were **not inclined to join clubs.**

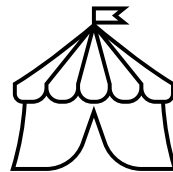
Instead, they want:



Volunteering



Programs



Events



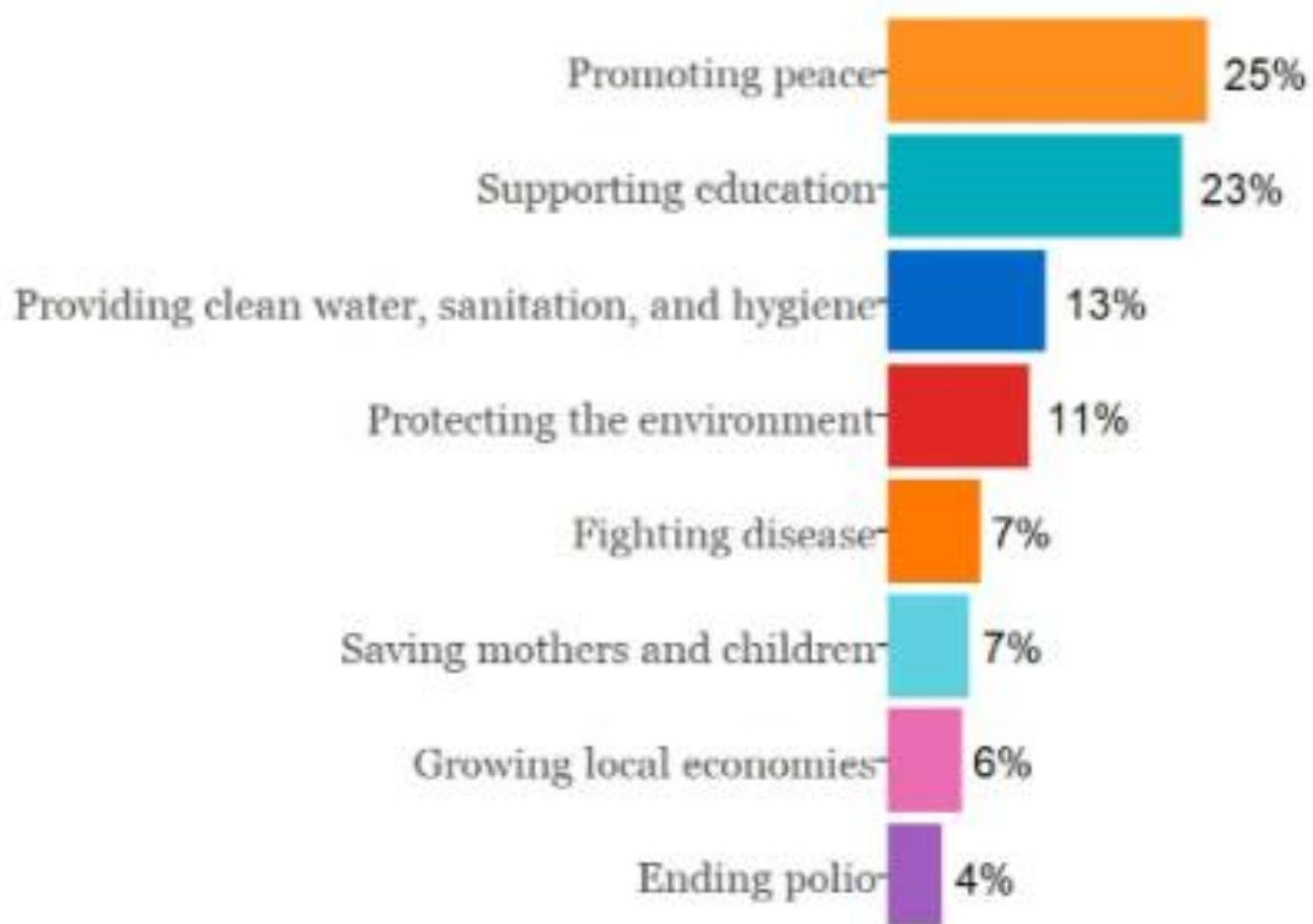
Low  
attendance  
commitment





## Which of Rotary's causes would you say is your top priority?

All Respondents, 2024 Rotary Participant Survey





# GENERAL PUBLIC

- Identify broader market trends
- Understand participation in voluntary groups
- Identify who would be interested in joining a service organization
- Identify what club characteristics are most appealing to those interested in joining a service organization



# KEY FINDINGS – GENERAL PUBLIC

- Interest in joining a service organization low among those not already a member of one
- Interest in joining a service organization highest in Nigeria, the Philippines, and India
- Very low interest in joining a service organization in Japan, Taiwan, England, Australia and the U.S.
- More activity in voluntary groups found in India, Nigeria and the Philippines and less activity found in Japan, Italy and the U.S.



# Are you currently active in these groups?

Respondents in India, Nigeria, and the Philippines were active in all groups and service organizations.



# KEY FINDINGS – GENERAL PUBLIC

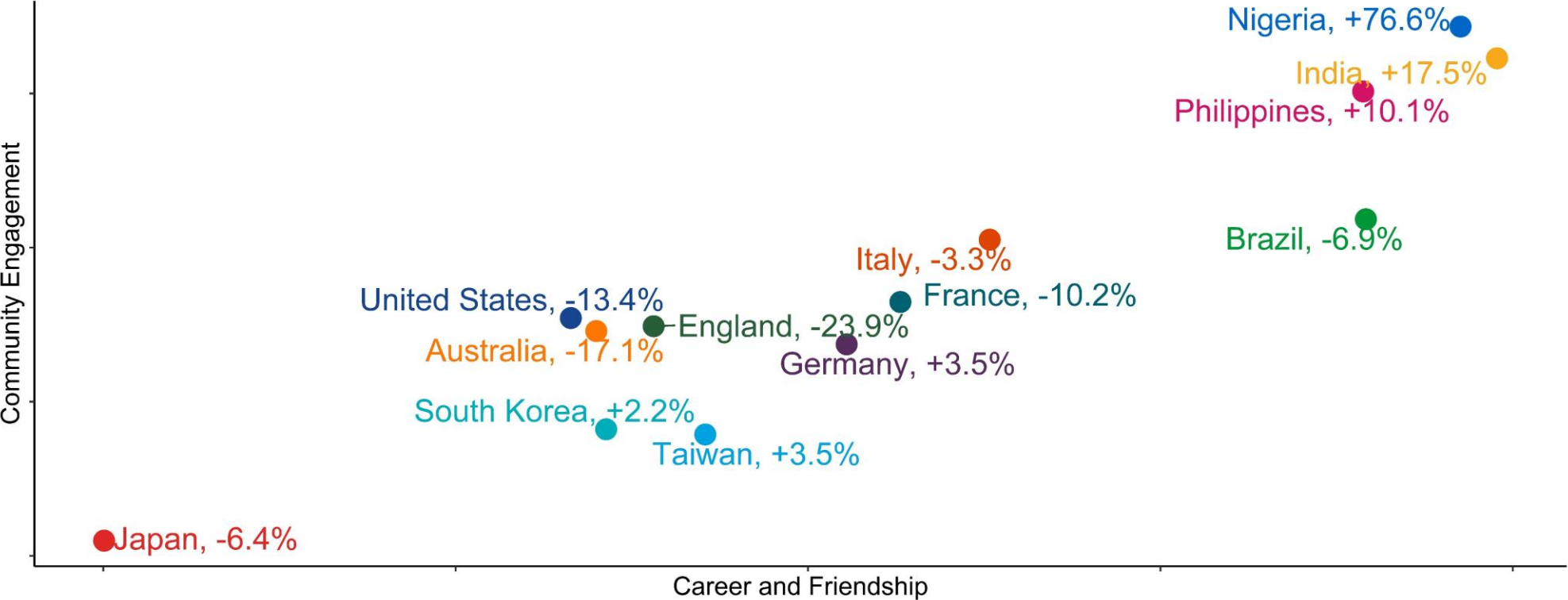
Respondents in India, Nigeria, the Philippines, and Brazil volunteer more than respondents in other countries. They are also more:

- Involved and interested in service organizations
- Career-oriented
- Engaged in their communities
- Concerned with friendships



# COMPOSITE RESULTS & MEMBERSHIP GROWTH

Nigeria, India, and the Philippines were the only markets to experience double-digit growth from 2018 to 2023.



# GENERAL PUBLIC

As societies become more developed and older, interest in service organizations declines.



# KEY FINDINGS - GENERAL PUBLIC

**Top three considerations** when deciding to **join a voluntary group**:

- shared **values**
- engaged in something **important to them**
- can **accomplish its goals**.





# KEY FINDINGS – GENERAL PUBLIC

Rotary International could become more appealing to the public by:

- clubs focusing on a cause
- reduce dues
- meet twice per month or less
- diversify the ages of Rotary club members
- increase the number of service projects per month





# OUR PROGRESS - STRATEGIC INITIATIVES

- The Strategic Alignment Evaluation
- Change Management
- Club Experience
- Evidence-Based Decision-Making
- **Impact Methodology**



# OUR PROGRESS - STRATEGIC INITIATIVES

## Impact Methodology Work

- **MEASURE** humanitarian work
- **STANDARDIZE** our measurement practices
- **CONTRIBUTE** to a global conversation
- **UNDERSTAND AND SERVE** communities



## EXPAND OUR REACH

The Action Plan is designed to help us achieve the priorities and objectives that are essential to fulfilling our vision statement. Each of the plan's four priorities has specific objectives that give us a **sustainable approach to supporting healthy clubs and a healthy organization, providing a positive, engaging experience for members and participants, and creating lasting change in the world.** Keep the objectives in mind when thinking about long-term planning, how to enhance the club experience, address challenges, act on opportunities, or take ideas to the next level.

**What we mean by Expand Our Reach?**  
Develop new and inspiring ways to engage with Rotary and welcome diverse Rotary participants and unite them in taking action.

Reach is about growth of our organization, and that means thoughtful growth of both members and participants. It's about reaching new and diverse audiences and partners and improving understanding of our brand and impact. By sharing stories of your club as people of action, you can give the public a better understanding of what Rotary does and how we make a difference, helping to attract members, volunteers, and donors.

**Why are we doing this?**

When more people affiliate with Rotary — not just as members but also as participants and partners — we can grow our capacity to make an impact. We must provide new ways to experience Rotary, whether through increased club flexibility or opportunities outside of the traditional club model. By creating new ways to bring people into Rotary, welcoming more people from all backgrounds as participants, partners, and members, and sharing our values with new audiences, we can improve our capacity to develop leaders and to create lasting change.

**What does this mean for me? How can I take action?**

The Reach priority can be a framework to help your club or district find solutions to challenges, address opportunities, and strengthen your club's direction. Use Reach resources to:

- Share stories of the impact your club makes to attract participants.
- Ensure your club is representative of your community.
- Consider using more than one method or platform to promote your club's activities.
- Ask members and guests for feedback and adjust meetings accordingly.
- Offer flexibility in the way members are able to attend club meetings and projects.
- Find inspiring ideas to create a more welcoming club environment to attract new and diverse members and participants.
- Work with new partners to offer more engagement opportunities for members.
- Participate in local activities and events that celebrate the diverse communities in your area.

*Let's share values with new audiences, create ways to bring people together to experience the power of Rotary, and show that we're inclusive, engaging, compassionate, and ambitious about making change.*

**OUR VISION STATEMENT:**  
Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

**RESOURCES**  
Begin reaching new and diverse audiences with these tools and resources:

**Brand Center** — Learn how to use Rotary's brand in all your club communications to build awareness about Rotary.

**Membership Assessment Toolkit (PDF)** — Be intentional about improving your club experience. Use these tools and their results to make change.

**Diversity your club** — Take this Learning Center course to learn strategies for expanding your reach and building relationships with new groups.

**Rotary Strategic Planning Guide (PDF)** — Effective Service Projects: This step-by-step approach will help you navigate planning a project.



## INCREASE OUR ABILITY TO ADAPT

The Action Plan is designed to help us achieve the priorities and objectives that are essential to fulfilling our vision statement. Each of the plan's four priorities has specific objectives that give us a **sustainable approach to supporting healthy clubs and a healthy organization, providing a positive, engaging experience for members and participants, and creating lasting change in the world.** Keep these objectives in mind when thinking about long-term planning and how to enhance the club experience.

**What we mean by Increase Our Ability to Adapt?**  
Make Rotary's operating and governance structures more efficient, more resilient, flexible, and effective while exploring new opportunities through innovation, creation, and adjustment.

As we increase our ability to adapt, we build our ability to respond to change and to create lasting change in the world. We need to look at how we can adapt more quickly to a changing world, from new perspectives to strengthen Rotary, and what new ideas we can bring forward.

**Why are we doing this?**

Through times of great growth, we have had to change how we work as an organization and what we need and want to be. The people who know us best — members, leaders, and participants — want Rotary to be more agile and welcoming of new and diverse voices. We need to improve our ability to change direction, to be nimble, and to make the adjustments needed to be successful in the future. We need to look for ways to create a strong foundation for innovation, sustainability, and growth.

**What does this mean for me? How can I take action?**

The Adapt priority can be a framework to help your club or district take actions to challenge, address opportunities, and strengthen your club's direction. Use Adapt resources such as the Change Model and Strategic Planning Guide to:

- Do things differently in your club to make more current and attract new members, such as introducing flexible meeting options with a paid or unpaid project.
- Increase your club's capacity to make use of the club's full member and participant potential.
- Facilitate change within your club by involving members and leaders in board meetings to help you do it more effectively.
- Work to introduce what doesn't work to your members and partners with them and show your club can adapt.
- Start a small fund to try new ideas and address ideas from members and other participants.

*Let's embrace a culture of innovation, innovation, and willingness to make risks so we can learn, evolve, and better serve our communities.*



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## ENHANCE PARTICIPANT ENGAGEMENT

The Action Plan is designed to help us achieve the priorities and objectives that are essential to fulfilling our vision statement. Each of the plan's four priorities has specific objectives that give us a **sustainable approach to supporting healthy clubs and a healthy organization, providing a positive, engaging experience for members and participants, and creating lasting change in the world.** Keep these objectives in mind when thinking about long-term planning and how to enhance the club experience.

**What we mean by Enhance Participant Engagement?**  
Create new ways to engage participants and provide valuable experiences that make them want to stay.

Each individual with Rotary is an opportunity to drive what Rotary can do for people in need and to make a difference in the world. We have the power to make a difference through a club, project, or event — the possibilities for meaningful service are endless. Our Rotary family should be helping and supporting each other to make a difference in the world.

**Why are we doing this?**

Our members are the heart of Rotary. They are the ones who make a difference in the world. We need to make sure we are providing a positive, engaging experience for our members and participants. We need to make sure we are providing a positive, engaging experience for our members and participants. We need to make sure we are providing a positive, engaging experience for our members and participants.

**What does this mean for me? How can I take action?**

The Engage priority can be a framework to help your club or district take actions to challenge, address opportunities, and strengthen your club's direction. Use Engage resources such as the Change Model and Strategic Planning Guide to:

- Find ways to engage participants and provide valuable experiences that make them want to stay.
- Offer new opportunities for personal and professional connections with existing and new participants.
- Support member participation, such as a committee role or being the lead in a club project or a club project.
- Find ways to engage participants and provide valuable experiences that make them want to stay.

*Let's work together to create a positive, engaging experience for our members and participants that makes a difference in the world.*

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**What we mean by Increase Our Impact?**

**We define, track, and analyze data from service projects to measure our outcomes, improve the quality of our programs, and create lasting change.**

This priority focuses on using measurement and data to develop and implement projects and show the positive, lasting change that members make. On a global scale, Rotary is committed to finishing the fight to eradicate polio. Through that effort, we've built invaluable partnerships, increased our capacity to make change, and developed expertise that we can use to support work in our areas of focus. This can also help improve club projects, ensure that our service responds to community needs, and engage people motivated by data in more activities.

**Why are we doing this?**

Our current and potential partners, participants, and donors want to engage with, join, and support organizations that clearly show the measurable impact of their work and that seek new and better ways to solve problems. Collecting and analyzing data helps us improve all our programs and projects as well as identify, replicate, and expand the ones with the most potential to create lasting change. The facts and details that clubs and districts learn through their measurement efforts also help them tell compelling stories about how Rotary makes a difference. Sharing these stories can attract like-minded leaders to clubs or new partnerships and can build a stronger and more diverse network of people to collaborate with on bigger projects.

**What does this mean for me? How can I take action?**

Thinking about increasing our impact can be a way to help your club or district find solutions to challenges, address opportunities, and strengthen your purpose. Use materials (such as community assessments, handbooks, and Learning Center courses) that focus on impact to:

- Deepen your connection with the community and create more meaningful and collaborative service projects
- Engage people who are motivated by data to ask community members what needs the club could help address
- Understand which projects and activities are making the biggest difference for your members, participants, and community
- Develop or update your club's strategic plan using the Strategic Planning Guide to assess and focus your club's priorities and goals

*Let's develop and implement practices and systems to define, measure, track, and analyze data from our service projects in more effective ways.*

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**Rotary Impact Handbook (PDF)** — This tool helps members plan and carry out measurement activities as part of their service projects so they can demonstrate the results.



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### RESOURCES

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## Conducting Community Assessments

Building a foundation for effective Rotary projects



Rotary

Click below to go to a page.

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## ROTARY IMPACT HANDBOOK

Using Measurement in Your Service Activities to Demonstrate Your Results

Rotary

Click below to go to a page.

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What stands out to you?

What questions do you have about  
Rotary's Action Plan?

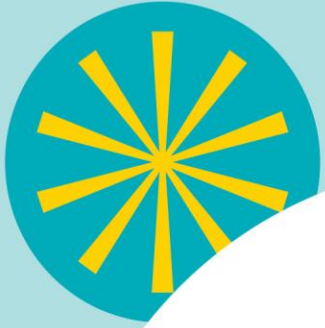


Q&A



Raise hand





How do you think your work as a Cadre member relates to the Action Plan?

Which priority do you think the Cadre contributes to the most?



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How do Cadre activities contribute to the Action Plan priorities (Impact, Reach, Engagement, Adapt)?

① Start presenting to display the poll results on this slide.



[rotary.org/cadre](https://rotary.org/cadre)

What do you want to do?

I want to...



### More information

- [Rotary Foundation Cadre Leaders directory \(PDF\)](#)
- [Cadre infographic \(PDF\)](#)
- [Site Visits: What Project Sponsors Should Know \(PDF\)](#)
- [Work With Rotary Experts \(PDF\)](#)
- [Project Planning Resources \(PDF\)](#)
- [The Rotary Foundation Cadre of Technical Advisers presentation \(.pptx\)](#)
- [Cadre of Technical Advisers - Guiding Principles \(PDF\)](#)



# GUIDING PRINCIPLES

The Rotary Foundation Cadre of Technical Advisers is guided by principles that anchor our work in the priorities of [Rotary's Action Plan](#). We established these principles to help us be more effective and make sure our work contributes to achieving Rotary's most important goals.

## ENHANCE PARTICIPANT ENGAGEMENT

We actively work with one another and our fellow Rotary members to enhance member and community engagement in Rotary's service efforts. We:

## INCREASE ROTARY'S IMPACT

We're Rotary volunteers from around the world, and we're ready to use our professional expertise to increase Rotary's impact in communities. We use our knowledge and technical skills to:

- Build Rotary members' capacity in Rotary's areas of focus, financial auditing, and project management
- Advise clubs and districts on how they can increase the feasibility, technical quality, and sustainability of their projects
- Evaluate grant projects to help The Rotary Foundation





## IMPACT

- Strengthen capacity to increase and measure impact
- Evaluate to help Foundation make evidence-based decisions
- Support resource development for members





## ENGAGE

- Opportunities for Rotary members
- Collaboration with district resource network partners
- Learning, connection strengthening, and cooperative activities among Cadre members





## REACH

- Advise project planners on inclusion and diversity
- Recruit from underrepresented groups
- Use skills and networks to support clubs and districts in reaching new audiences and partners
- Reinforce Rotary's reputation as a leader in humanitarian service and areas of focus





## ADAPT

- Enhance projects and find better solutions
- Learn how to improve
- Research and testing to evaluate, learn, lead, and adapt to changing world





# What's next

Review and refer to [Rotary Action Plan resources at rotary.org/actionplan](https://rotary.org/actionplan) and [Cadre Guiding Principles](#)

Which Action Plan priority will you focus on in the coming Rotary year?

What will you encourage your club or Cadre group to do to promote and contribute to Rotary's Action Plan?

Share ideas and collaborate!



## Learning and advising

Continuous learning to improve skills and knowledge to be more effective

Project advising and learning facilitation

Resource and engagement activity development

Seek out and pursue opportunities for learning and advising

## Leader alignment

Technical coordinator and regional organizer goals with Action Plan priorities

Be responsive to Cadre leader communications and participate in leader-led activities

## Program alignment

Better data to better tie Cadre activities to Action Plan inputs, outputs, outcomes, impact and inform adjustments

Complete Cadre surveys

# What's next

the  
CADRE