

The background of the slide features a blue gradient with silhouettes of graduates in the foreground, throwing their caps into the air.

# WELCOME!

## D5500 Club Officer Session

Bruce Monro  
DG 2025-26  
[bruce-tubacaz@outlook.com](mailto:bruce-tubacaz@outlook.com)  
520-850-4406



# Saturday's Agenda

Duration	Start	Stop	President / AG	Membership Public Image	Secretary Treasurer
0:30	8:00 AM	8:30 AM	Breakfast		
0:30	8:30 AM	9:00 AM	Intros		
0:15	9:00 AM	9:15 AM	DGE Remarks		
0:50	9:15 AM	10:05 AM	Club Governance Michael Drake		
0:15	10:05 AM	10:20 AM	Break		
0:50	10:20 AM	11:10 AM	Presidents & AGs Working Together Part 2 Steve Johns / Emma Carrillo	Club Experience Bruce Monro	Secretary Responsibilities Leo Lawrenson
0:50	11:10 AM	12:00 PM	PETS Breakout Session- Part 2 Bruce Monro	Public Image Basics Leo Lawrenson	Treasurer Responsibilities Mike Suba
0:15	12:00 PM	12:15 PM	Working Lunch		
0:50	12:15 PM	1:05 PM	Grant Management Seminar Kristi Halvorson		
0:50	1:05 PM	1:55 PM	Youth Protection Candy Pardee (Emma Carillo)		
0:15	1:55 PM	2:10 PM	Wrap-up / Q&A Bruce Monro		

# Introductions

- Name
- Club
- Club Role
- How Long a Rotary Member?
- What was your most memorable moment in Rotary?

# Your Club's 3 Year Rolling Goals

Building Continuity and Driving Impact  
Across Leadership Transitions



## Why 3-Year Rolling Goals?

### Enhancing Continuity and Collaboration



#### **Continuity Across Leadership Changes**

Provides consistency in vision and projects despite annual changes in leadership.



#### **Better Long-Term Planning**

Allows clubs to adapt and grow over a multi-year timeline.

# Why 3-Year Rolling Goals?

## Enhancing Continuity and Collaboration

### **Increased Member Engagement**

Drives meaningful engagement and collaboration, giving members a shared sense of purpose.

### **Increased Impact**

Serving and strengthening our communities, local and global.





# The Mechanics of Rolling Goals – How Does it Work?

- **Annual Review and Update:**  
Leadership teams review and adjust goals annually to reflect evolving needs.
- **Priority and Flexibility:** Focus on 6 priority goals but allows clubs to choose other goals.
- **Collaboration Across Teams:**  
Promotes teamwork and input from members to shape objectives.

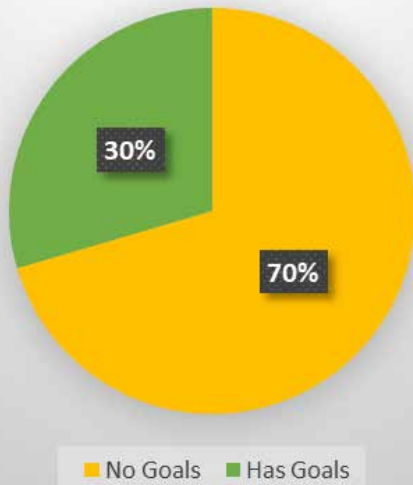


Photo by [Sebastien Bonneval](#) on [Unsplash](#)

**Rotary**  
Zones 26 & 27

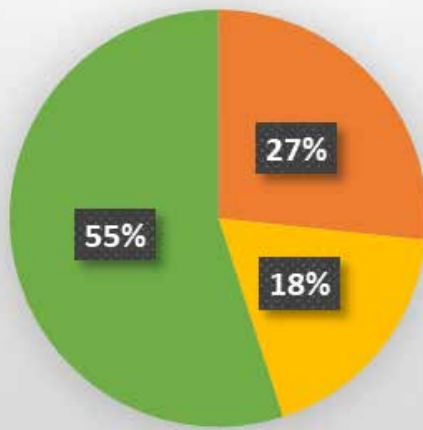
1. Discuss Goals, Agree & Communicate
2. Submit Goals to Club Central
3. Develop Plans to Meet Goals
4. Track Goals and Course Correction

## Club Goals Status



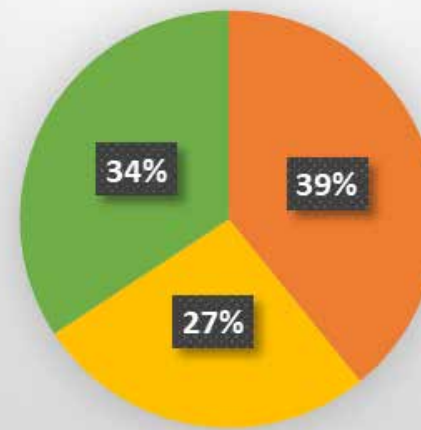
Goals Are a Basis for Club Success... Step 1 of Many

## Membership Performance Clubs With Goals



Member Loss No Change Member Increase

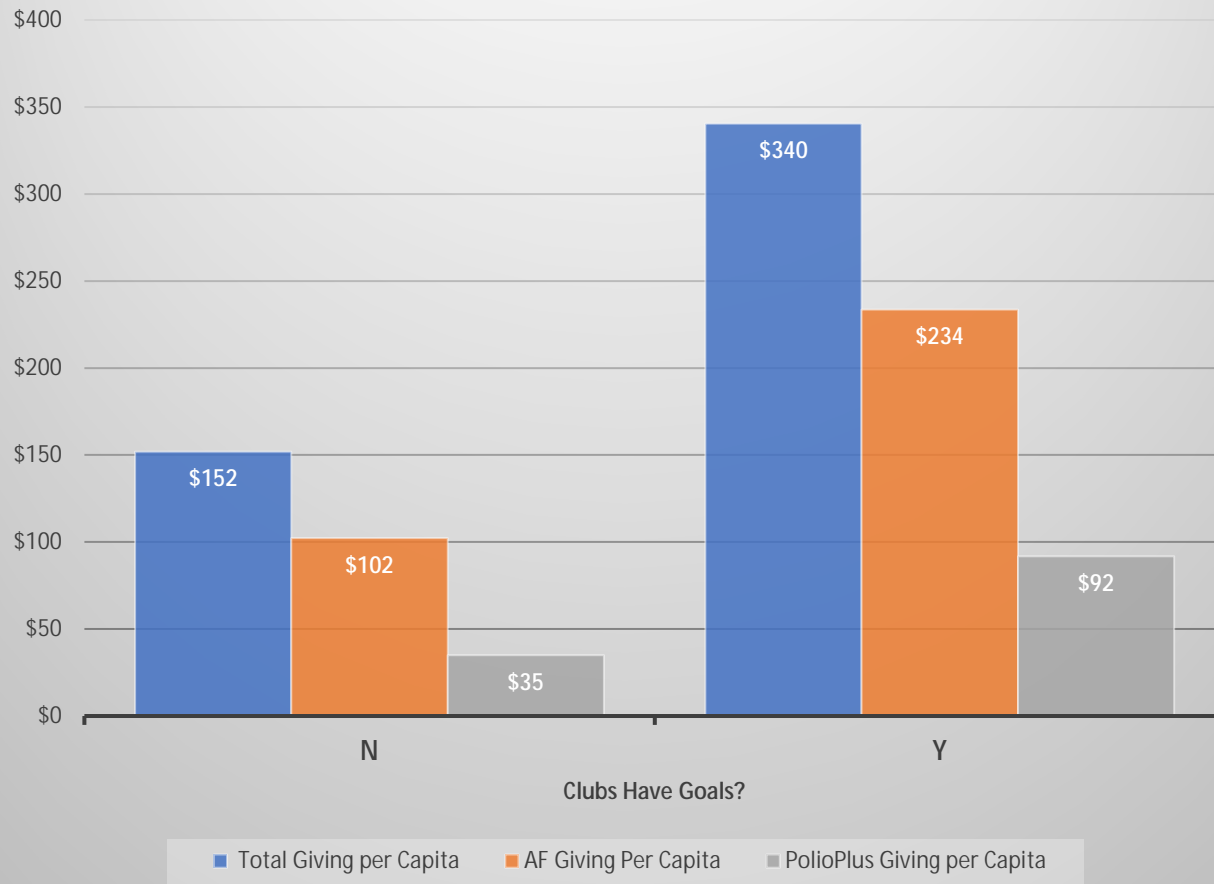
## Membership Success Clubs Without Goals



Member Loss No Change Member Increase



# Member Giving Comparison



Goals  
and  
Foundation  
Giving

# D5500 Important Dates 2025-26

- Spring Officer Conference
- DG Installation
- Identify PE's for Your Club
- District Conference
- USA-Mexico Friends Conference
- AZ Rotary Days of Service
- Ride to End Polio Aid Station
- RYLA
- RLI
- RLA

May-June (Sat)  
Regional / multi-officer

June 7<sup>th</sup>, Sands  
Club, UofA Stadium

Now!-Sept 15<sup>th</sup>

Sept 25-27,  
Tubac Resort

Oct31-Nov03;  
Yuma

April 22-26

Nov 23, location  
TBD

Jan 16-19, 2026

Sessions at  
District  
Conference

September,  
nominations in July/August





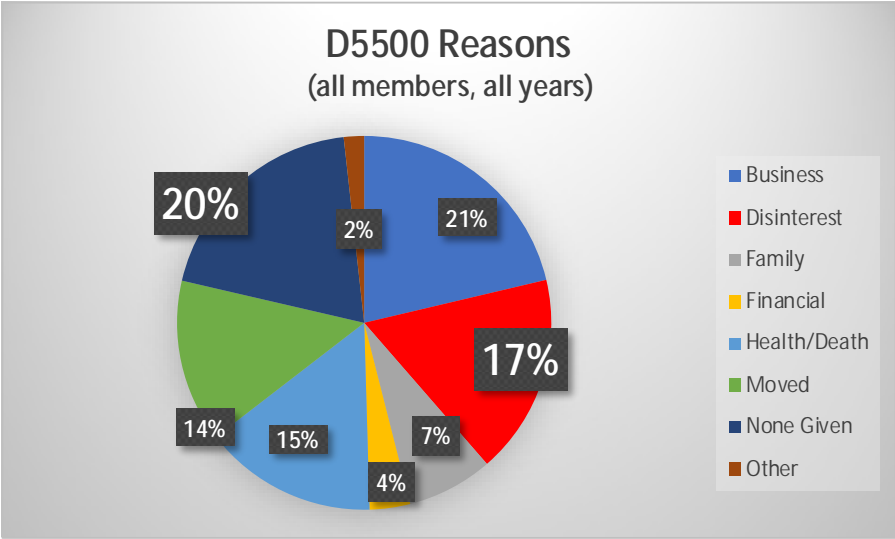
# D5500 Assistant Governors

REGION	AREA	CLUBS	AG 2024-25	AG 2025-26
EAG	D5500		Steve Johns	Steve Johns
1	Yuma	Ft. Yuma, Yuma Foothills, Yuma Sunrise, Yuma Crossing	Fatima Smith	Annette Lagunas
2	Yuma	San Luis Frontera, Somerton, Yuma, Yuma North End	Marcos Ramirez	Anne Fisher
3	Ajo	Ajo	Sherri Hurd	Sherri Hurd
4	Casa Grande	Casa Grande, Casa Grande Daybreak, Maricopa Florence, Coolidge	Bonnie Palmer	Nathan Palmer
5	Globe	Globe, Miami Copper Cities, Superior	Dick Kroese	John Oszust
6	Marana	Marana, Dove Mountain, SaddleBrooke, SaddleBrooke Sunrise, Oro Valley	Barbara Barr-Beng	Aleta Weiner
7	Tucson	Casas Adobes, Tucson Verde, Kino, Vail	Emma Carrillo	Emma Carrillo
8	Tucson	Catalina, Rincon, Tucson, Pantano	Ann Huber	TBD
9	Tucson	Old Pueblo, Tucson Presidio, Tucson Sunrise, Tucson Sunset, Tucson Rainbow	Shawn Tacey	Shawn Tacey
10	I-19 Corridor	Mountain Empire, Nogales, Rio Rico, Tubac	Tony Vartola	Tony Vartola
11	Sierra Vista	Bisbee, Sierra Vista, Sierra Vista South, Sierra Vista Satellite	Candy Pardee	Kay Phillips
12	Cochise County	Benson, Douglas, Sierra Vista Sunrise	Joe Puett	Joe Puett
13	Safford	Gila Valley, Safford, Wilcox	Bruce Monro	Candy Pardee
14	Green Valley	Green Valley, Sahuarita, Valle Verde	Joyce Finkelstein	Sue Horton
	Tucson	Tucson Rotaract		Leo Lawrenson

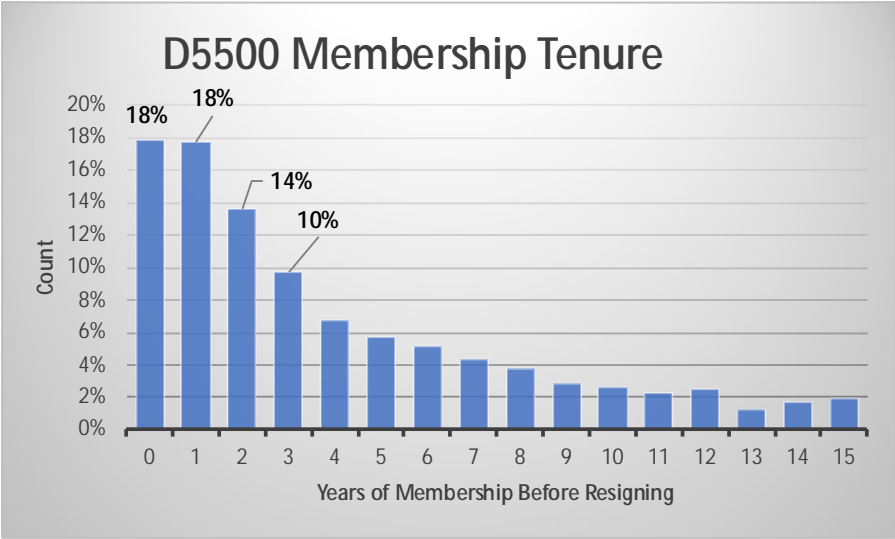
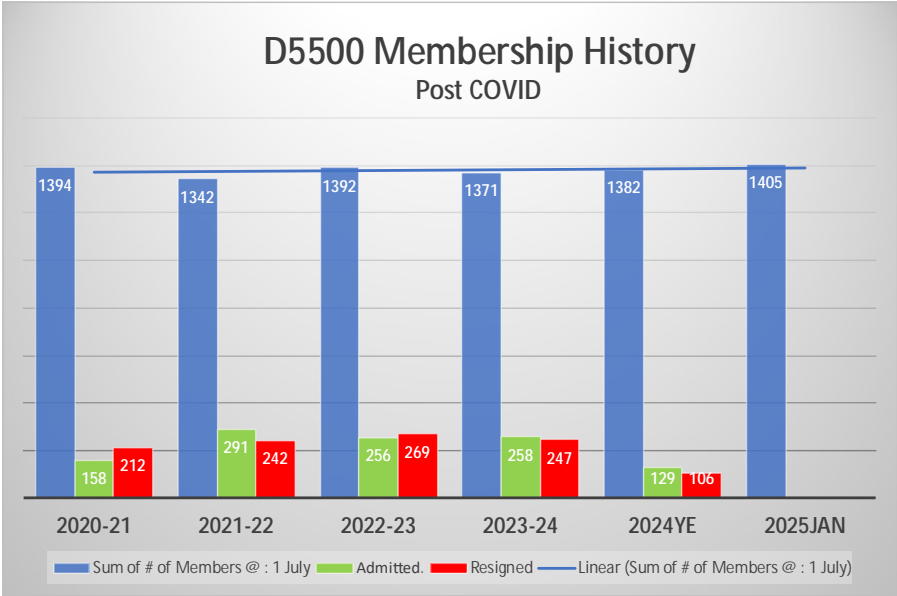




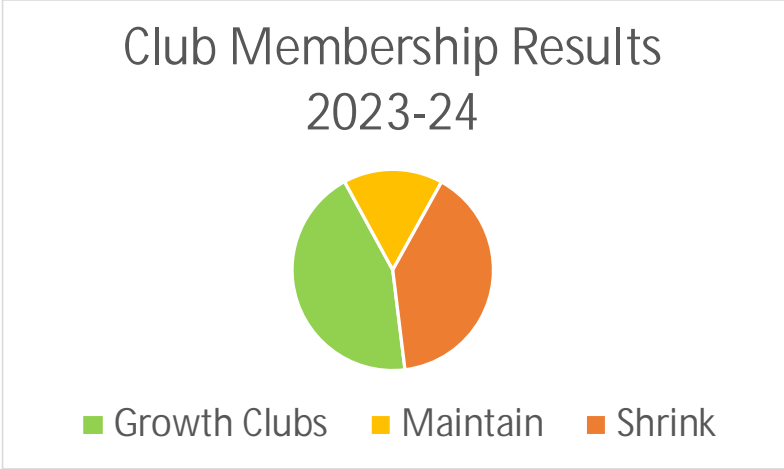




# D5500 Membership Report



Attraction Rate 15.9%  
Resignation Rate 15.6%







# Vibrant Club = Great Club Experience

- Conducts frequent & meaningful projects
- Reflects its members interests
- Is relevant in its community
- Has a unique identity and advertises it
- Is welcoming to members and visitors
- Tries new ideas
- Is Fun!



**Vision - Belonging - Fun**

# One President's Lessons Learned

- Communicate, communicate, communicate to your members
  - Club priorities. Goals, Budgets, Activities
  - You need everyone's buy-in and help.
- Membership retention is as important as new membership recruitment. Maybe more so.
  - We do a good job of attracting new members (16%), not so good at keeping members (-16%). Your club is similar.
  - If you lose a member, you need a new member just to stay even.
  - Check-in with every member regularly, especially ones on the fence.
  - Assign simple tasks to members on the fence to draw them back in.
  - An agenda sent out before the meeting allows members who aren't attending to stay up to speed.
  - Don't leave a new member hanging, nor overwork them. Provide a mentor.
  - Goal: Zero members resigning for unsatisfactory club experience
- Avoid making unilateral decisions. Use your board.
  - Buy-in and workload
  - Speak to members as the Board, not just yourself
- Make members' requests your priority.
  - Follow up in a timely manner with member requests for your help or info.
  - Don't give them a reason to think you don't value their contributions.
- Don't ask a member to do something that you wouldn't do yourself.
- Break-up a large task into bite-sized chunks to increase the chances a member will agree to help.
- Sincerely, frequently, and for specific reasons, recognize members' contributions.

# Stoplight Chart for Retention-Evaluate

## 1. Evaluate each member

- Attendance
- Willingness to participate in activities
- Shedding or taking on assignments
- General attitude
- Done by President & membership committee- minimum

## 2. Assign color code to each member:

1. **Blue:** Regular attendance. Club officer or committee chair. Takes on higher level assignments, e.g., "coordinating", "managing", "developing". Volunteers for assignments. Works with the District or higher.
2. **Green:** Committee member or chair; Regular attendance; Agrees to an assignment when asked. Good attitude.
3. **Yellow:** Meeting attendance is down; giving-up assignments/unwilling to take on new assignments; Deteriorating attitude. Sits in the back; Doesn't stay after the meeting to socialize. OR, a new member.
4. **Red:** Attendance less than 50%; Gave up committee or work assignments a while ago; Declines new assignments. Bad attitude- makes negative comments. Interpersonal friction with member(s). Emotionally has left the club.





# Stoplight Chart for Retention-Actions

1. Develop plans for members who are in the yellow category.
1. Meet with member. Include a member (green or blue; sponsor) who is closest to the member.
2. Keep it casual but have an honest conversation about their satisfaction with the club and Rotary.
3. Focus on how the club can meet their priorities & interests.
4. Try to find a list of mutually agreeable actions to take.
  - Evaluate any changes to the club that address their concerns. Ask for their help.
  - Ask them to take on smaller assignments. Team with their best friend. Build up from there.
  - Recognize & reward.
2. Try above with a Red member. At least it will clear the air about their intentions. Also, practice for yellow conversations.
3. Do not take green or blue for granted. Don't overload them with assignments. Sincere and specific recognition & reward is always appreciated.



# RI & District Dues

	2023-24				2024-25				2025-26		
Item	Jul-23	Jan-24	Total		Jul-23	Jan-24	Total		Jul-25	Jan-26	Total
Dues	\$37.50	\$37.50	\$75.00		\$39.25	\$ 39.25	\$78.50		\$41.00	\$41.00	\$82.00
Subscription to The Rotarian	\$6.00	\$6.00	\$12.00		\$ 9.00	\$ 9.00	\$18.00		\$ 9.00	\$9.00	\$18.00
Council on Legislation Assessment	\$1.00	Not assessed in January	\$1.00		\$ 1.00	Not assessed in January	\$1.00		\$ 1.00	Not assessed in January	\$1.00
General Liability Insurance	\$5.75	Not assessed in January	\$5.75		\$ 5.19	Not assessed in January	\$5.19		\$ 5.19	Not assessed in January	\$5.19
Directors & Officers/Employment Practices Liability	\$1.16	Not assessed in January	\$1.16		\$ 1.24	Not assessed in January	\$1.24		\$ 1.24	Not assessed in January	\$1.24
Total	\$51.41	\$43.50	<b>\$94.91</b>		\$55.68	\$43.50	<b>\$103.93</b>		\$57.43	\$50.00	<b>\$107.43</b>
District 5500 Dues	\$29.50	\$29.50	<b>\$153.91</b>		\$29.50	\$29.50	<b>\$162.93</b>		\$30.75	\$30.75	<b>\$168.93</b>

# Why Pay Dues to be a Member?



**Training-** Rotary offered learning, club service and service projects offer experience in leadership and project management that are directly applicable to the workplace. Your next promotion or job could be because of the work you did at Rotary.



**Friendship-** How many new friends have you made since joining Rotary. What's the price of a good friend?



**Health-** Scientific studies have shown that people who work in service are in better health and live longer. How much is living longer worth to you?



**Political donations & religious tithing-** Though Rotary is neither political or religious, there are similarities to these organizations. Both purport to improve people's lives. There is no doubt that Rotary's work does improve peoples' lives, many of whom are the most vulnerable in our society.



**Business Networking-** Members are a valuable market for your product or service.