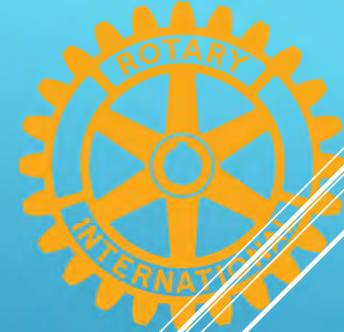


# GOAL SETTING: HOW DO WE DO IT?

Exploring My Rotary.org and  
Using Rotary Club Central to Set Goals

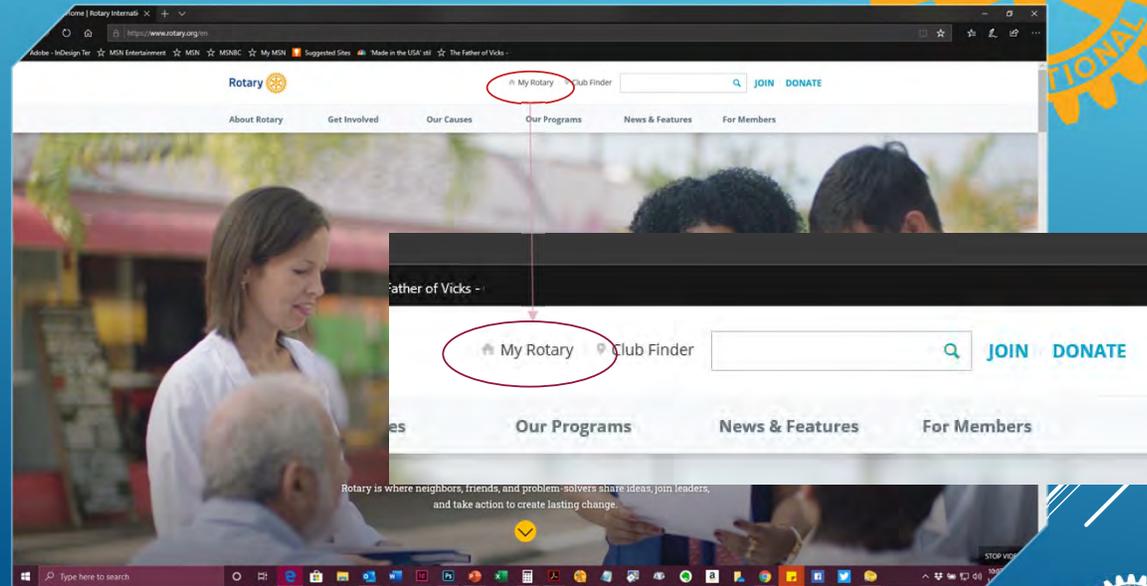
P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



This is Goal Setting: How Do We Do It? Which sounds like it could be a very philosophical exploration of your club's needs and abilities and charts a course based on those needs. It's not. This is a VERY nuts and bolts, lets get down to brass tacks, look at how you physically enter those goals into an on-line tool called "Rotary Club Central". Rotary Club Central, or the RCC, lets you enter your club's annual goals and then track them throughout the year. This session is a "how-to" for the RCC. If you have a device with internet access, I invite you to go to [Rotary.org](http://Rotary.org) and follow along. Important note: even if you have experience with the RCC, a major overhaul has happened and everything looks different!

# START AT ROTARY.ORG

Select: My Rotary (you've got an account, right?)



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



: It all starts at Rotary.org. Rotary.org is the public face of Rotary. It's a place anybody can visit to find out about Rotary programs, clubs, history...the whole Rotary package. This is what the Rotary.org homepage looks like (and I hope that's not news to you). A note about today's presentation...it will contain screen shots of everything we're talking about. I wasn't brave enough to try to setup a hotspot and do this live.

Because everything about the look of RCC has changed since last year, these are all recent, up to the minute screen shots, they just aren't live. What's here should look the same way it will look when you log in...but things can and do change on the website all the time. If something doesn't look exactly the way it looks on my slides, chalk that up to

website upgrades.

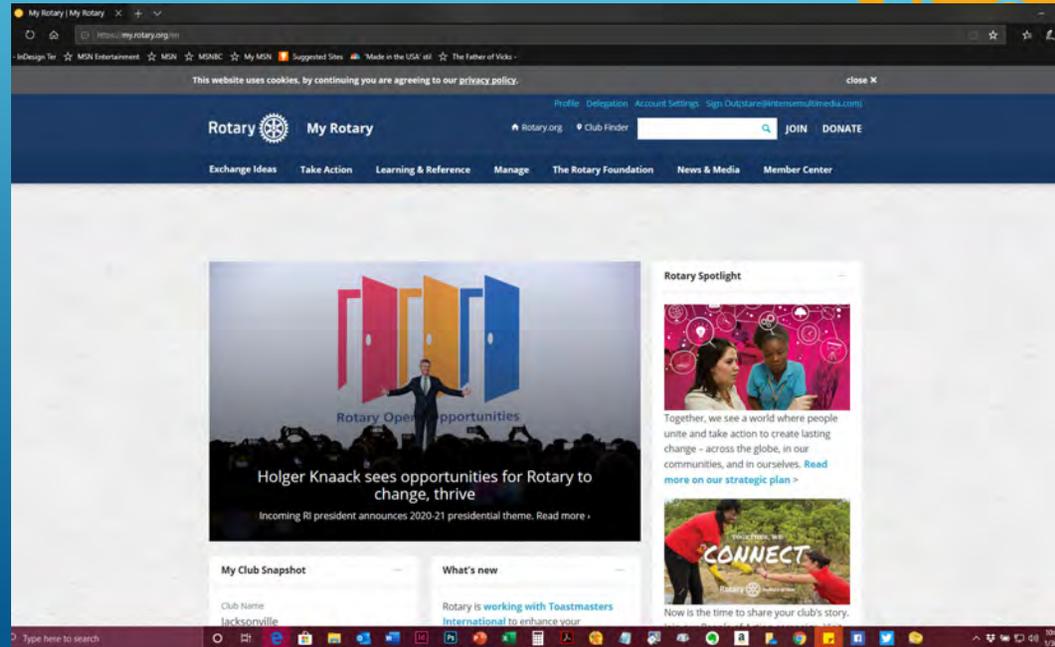
As I said, Rotary.org is the public face of Rotary. Anybody can visit. If you are a MEMBER of Rotary, then Rotary.org is the doorway to the private, “members only” club called “My Rotary”. If you look closely across the top of the Rotary.org navigation bar, you’re going to see a tiny little link called “My Rotary”. It has a little home symbol next to it.

[click] I’ve tried to blow it up here so you can see it.

When you click the “My Rotary” link, you will be transported to the members only area of the Rotary website. You must have an account and a password to get into My Rotary. I’m hoping you do...if you don’t, we can talk about that after the presentation. You really should have access to My Rotary as a club president. It will make your life so much easier. If you absolutely can’t get on-line for whatever reason, you need to recruit someone within your club who is computer and internet savvy. They can get on-line for you and enter all of the information we’re going to discuss. If you want to take the plunge but need somebody to talk you through it, I’m available by phone or e-mail and would be happy to do some tech support. Get with me after and we can set something up. So, let’s click on My Rotary...

# MY ROTARY: HOME PAGE

The Secure "Members-Only" Part of Rotary.org



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central

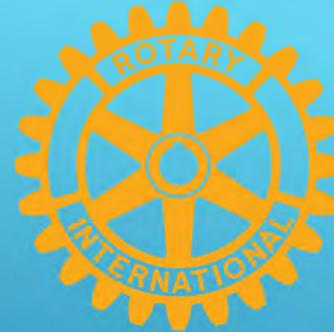


And welcome to the MyRotary Home page. Since we're here, I want to take a moment to talk about the MyRotary section of the website before we jump into the RCC.

## MY ROTARY HOME PAGE

The Secure “Members-Only” Part of Rotary.org

- **BUILD YOUR PROFILE**  
It’s like Rotary Facebook! Rotarians Worldwide can find you
- **JOIN INTERNATIONAL DISCUSSION GROUPS**  
Listen, Learn and Compare notes with Rotarians from around the World
- **REVIEW AND SUBMIT SERVICE PROJECTS**  
Get inspired by others, or show off a little bit and submit your project to the Rotary Showcase
- **STAY INFORMED**  
The latest Rotary News and Information, PLUS access to on-line tools (like RCC), place to Search on-line Resources



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



My Rotary is a little like Rotary social media. Think of it as Rotary Facebook. Within the My Rotary section you can create and build a profile about yourself and your Rotary life.

[click] You can get involved in international discussions groups about a wide range of topics.

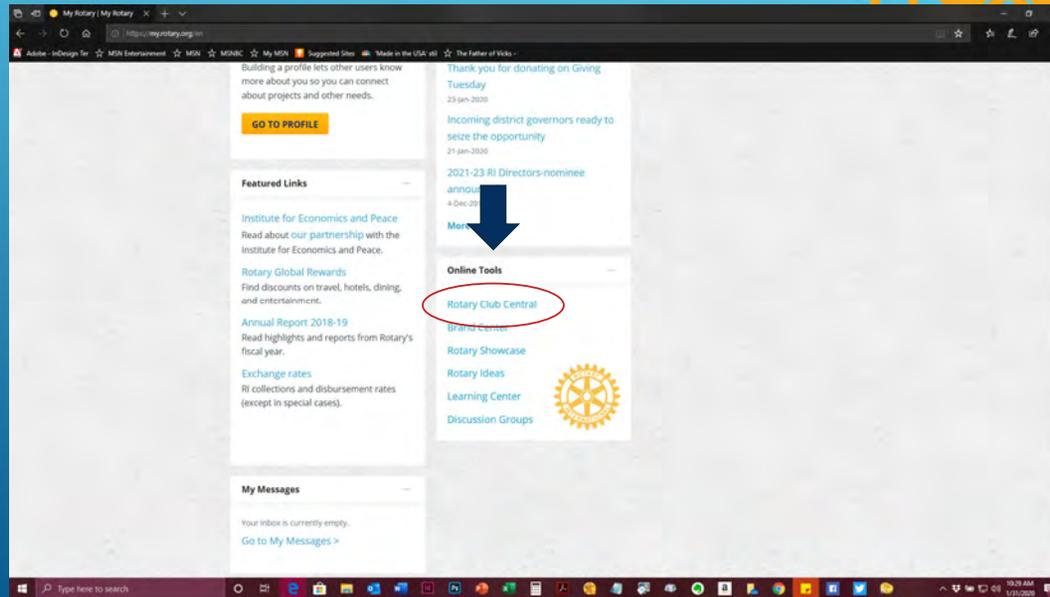
[click] You can review service projects done by clubs all over the world for ideas and inspiration. Or, if your club has done a cool service project, make sure to post it in the Rotary Showcase.

[click] My Rotary is loaded with news and information and it’s a great place to stay informed about all things Rotary. My Rotary is also a place where you can access an array of On-line tools, including the section we’re going to be

looking at: Rotary Club Central...the RCC. Getting to Rotary Club Central is VERY easy. You can get to it from about anywhere. This is an important tool...they do not want you to have to search for it. [click]

## MY ROTARY: HOME PAGE

An RCC Link is on the My Rotary Home Page. Scroll down. The Last Highlight Box contains "On-Line Tools" Choose "Rotary Club Central"



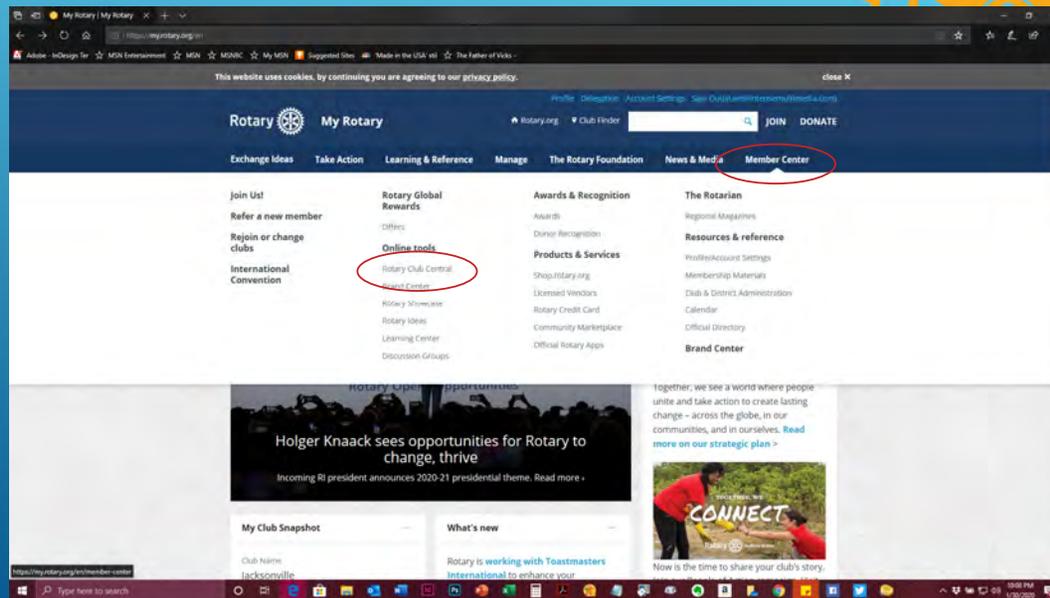
P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central

Rotary 

For instance, if you are on the My Rotary Home page and scroll down to the bottom of the page, you will find a highlight box marked "On-Line Tools". It's the last box at the bottom of the page. The first thing on the list: RCC. But maybe you don't want to go to all the trouble of scrolling all the way to the bottom of the page. No problem...

## MY ROTARY: HOME PAGE

Hover over "Member Center" and get the dropdown. Again, you will see "On-line Tools" as a header. Choose "Rotary Club Central"



The screenshot shows the My Rotary website interface. The navigation bar includes 'Exchange Ideas', 'Take Action', 'Learning & Reference', 'Manage', 'The Rotary Foundation', 'News & Media', and 'Member Center'. The 'Member Center' dropdown menu is open, displaying several categories: 'Join Us!', 'Refer a new member', 'Rejoin or change clubs', 'International Convention', 'Rotary Global Rewards', 'Online tools' (with 'Rotary Club Central' and 'Rotary Central' highlighted), 'Awards & Recognition', 'The Rotarian', 'Resources & reference', and 'Brand Center'. A large gear icon with 'ROTARY' and 'CENTRAL' is overlaid on the right side of the page.

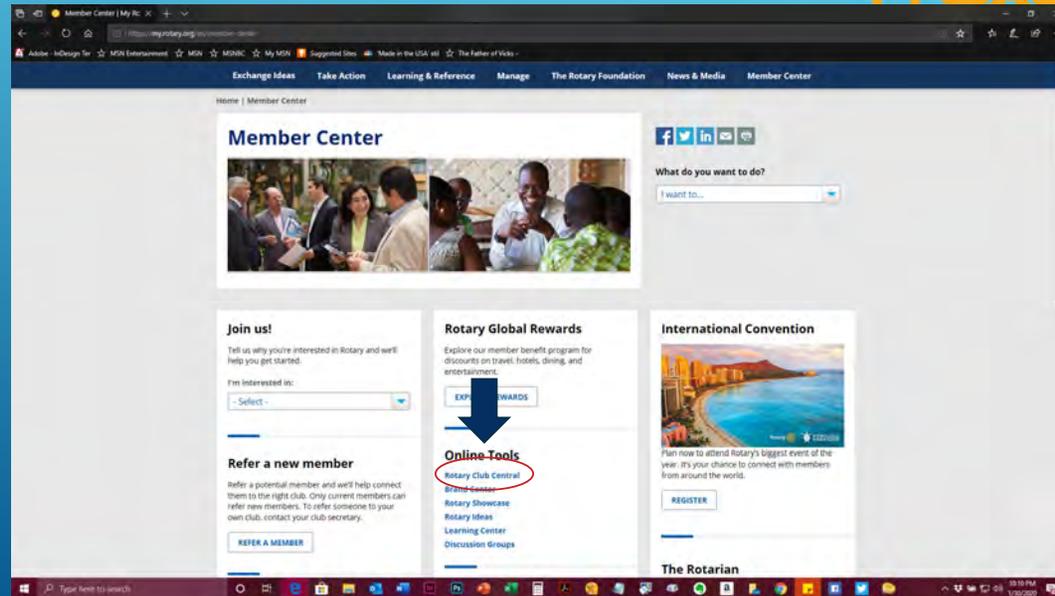
P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



: If you hover over the far right nav item called "Member Center"...you will get a dropdown animated menu. Look in the second column...and there it is again, the section called "On-line Tools" and...again...the first tool on the list is Rotary Club Central.

# MY ROTARY: MEMBER CENTER

Or, go into the "Member Center" and there it is again!



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



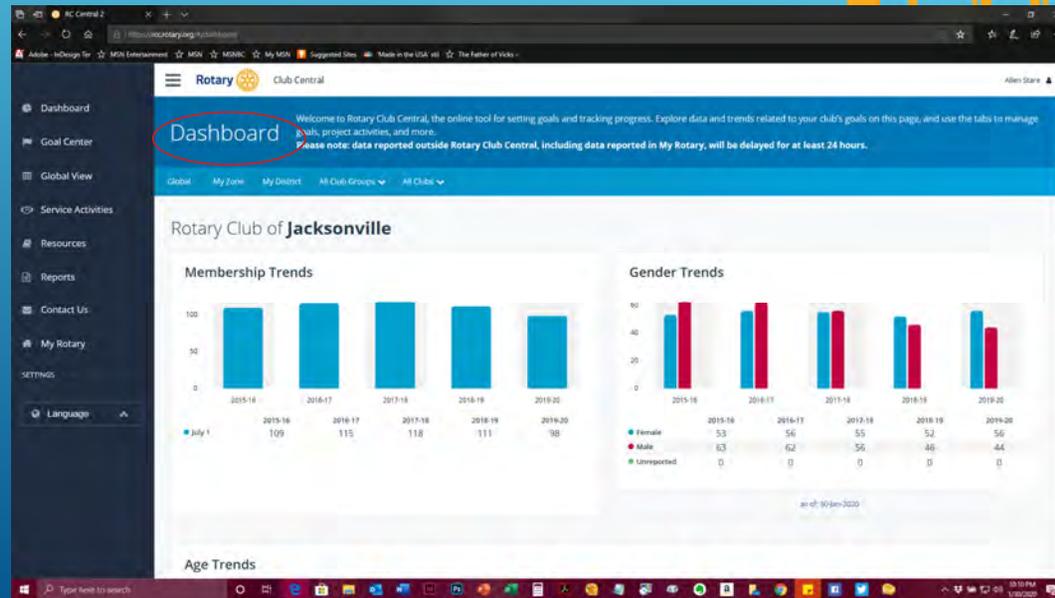
Maybe while you're hovering over Member Center, you decide to click on it. Great! The Member Center has a bunch of outstanding member resources...and, of course, another way to get to the RCC. There's the same "On-line Tools" section again featuring Rotary Club Central as the first option.

All roads lead to Rotary Club Central! Those are three, there are probably more hidden in My Rotary that I don't know about. It doesn't matter how you choose to get there, when you click one of those links you will open the RCC. What you are actually opening is an entirely separate, secured website called [rcc.rotary.org](http://rcc.rotary.org). You don't need to know

that, don't write it down...the only reason I mention it is because you might notice in your address bar that something changed. DON'T bookmark this website and go to it directly. RCC passes your login credentials from My Rotary in order to open. Always access RCC from My Rotary, and you can always get back to My Rotary from the RCC Dashboard...and speaking of the RCC Dashboard...

# ROTARY CLUB CENTRAL: DASHBOARD

The RCC Landing Page, and a Snapshot of your Club!



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central

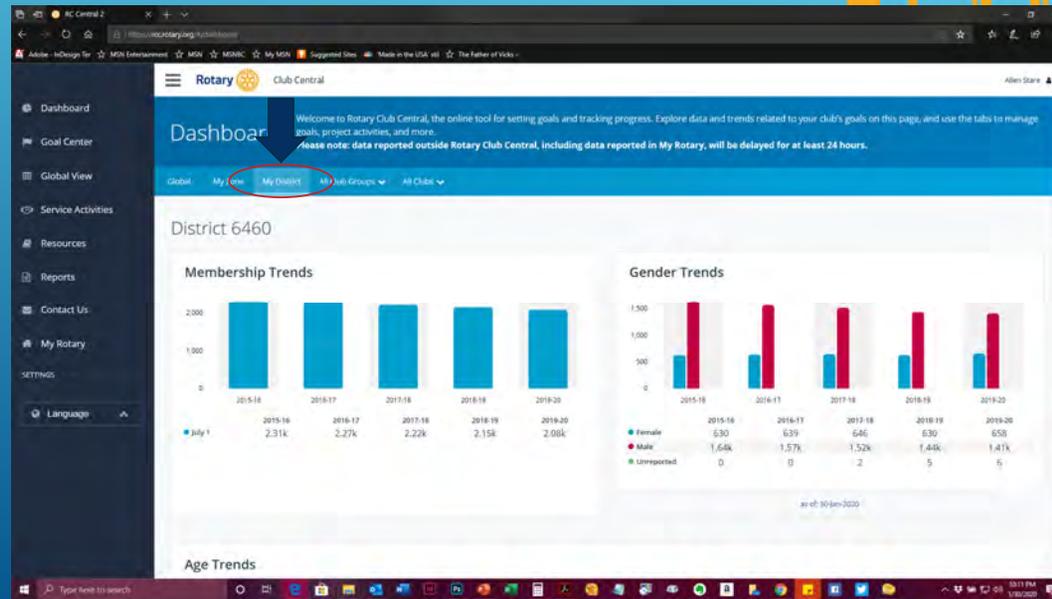


: This is it. By default, the RCC Dashboard opens on a snapshot of your club. The RCC knows this, because it's the club you identified in your member profile on My Rotary. You can use a drop down selector to look at any club in the District, but they figure you're probably most interested in your club, so that's the one you get. The Dashboard homepage will populate with a TON of information about your membership. Right at the top, total membership and membership trends over the last few years. You'll see gender breakouts...you can see that in Jacksonville the membership gender breakout was almost even in 2017-18. The ladies have been slowly taking over since and, quite frankly, we are much better for it. If you scroll down, you'll find things like age breakouts for your

membership...what color cars they drive...shoe size. Okay, I'm joking...but you DO get a LOT of information from the RCC...IF you're good about reporting your club information.

# ROTARY CLUB CENTRAL: DASHBOARD

Use the Tabs to look at District, Zone and Global Comparisons



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central

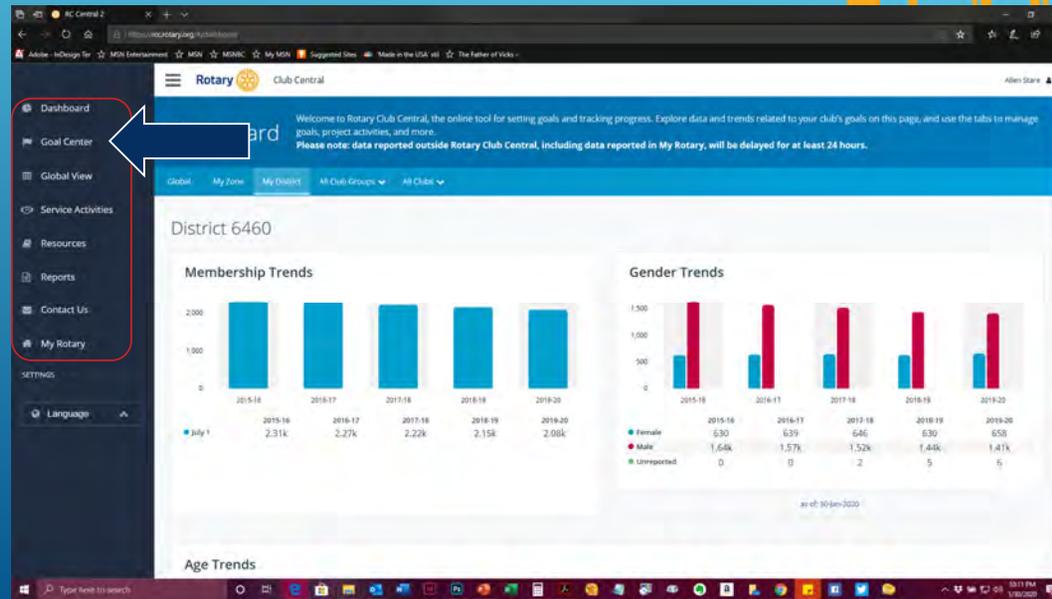


: The RCC Dashboard also allows you to look at the same information on a District, Zone and Global scale. Here's District 6460. You can see the slight but troubling trend towards a decrease in overall membership the past few years...but you guys are going to change that, right?? You can also see that, although Jacksonville has reached gender equality, the District as a whole is still heavily male-centric.

You could play around with this data all afternoon...but that's not why we're here. We need to set some GOALS!

# ROTARY CLUB CENTRAL: DASHBOARD

Navigation on the LEFT SIDE opens all RCC Tools and Options – Choose GOAL CENTER



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



If you look on the left-hand side of the Dashboard Screen you will see a navigation menu. You have access to this menu from all screens in the RCC. The menu items are fairly self-explanatory. If you need to return to My Rotary, it is the last item on the menu. It closes down the RCC and takes you back to your account in My Rotary. Right now we want to select the “Goal Center”. It’s the second item on the Nav Menu right under the Dashboard listing. Ready?

# ROTARY CLUB CENTRAL: GOAL CENTER

Navigation on the LEFT SIDE opens all RCC Tools and Options – Choose GOAL CENTER

The screenshot shows the Rotary Club Central Goal Center interface for the Rotary Club of Jacksonville. The navigation menu on the left includes Dashboard, Goal Center, Global View, Service Activities, Resources, Reports, Contact Us, and My Rotary. The main content area displays the club name, a year selector (2019-20), and a list of goal categories: Members & Engagement, Rotary Foundation Giving, Service, Young Leaders, Public Image, Rotary Citation, and All. Below this, there is a table of goals with columns for Achievement and Goal.

Category	Achievement	Goal
Club membership	100	100
Service participation	..	88
New member sponsorship	..	3
Leadership development participation		

P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



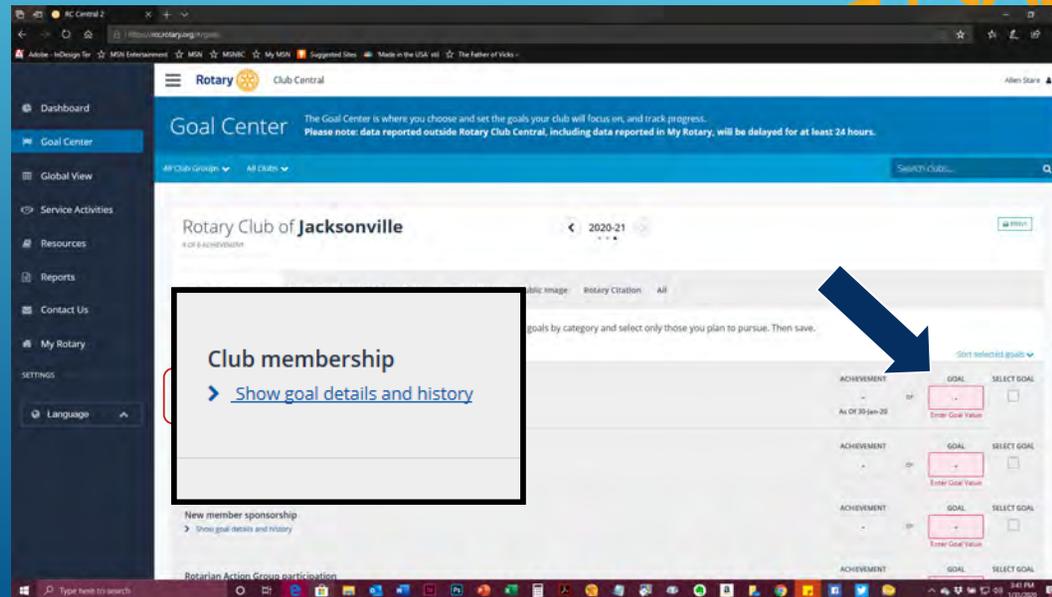
Welcome to the Goal Center!! This is where you will set and enter goals for your year initially. THEN, throughout the year, you will return to update those goals as they are completed...or in the process of being completed. If you look at the tabs under your club name, you can see that the various goals have been grouped by subject area. Members and Engagement, Rotary Foundation, Service, etc. The page underneath each tab contains a listing of the specific goals related to that area. If you're having trouble finding a goal...you've forgotten what area it's in...there is an "All" option that will list every possible goal on one long page. There is also a Rotary Citation Tab that lists the goals needed for your Club to get the Rotary Citation. These are pulled from other goal areas. The "Citation" tab makes it

easy for you to review and track your Rotary Citation goals.

[Click] There's another very important part of the Goal Center navigation I don't want you to miss. At the top center of the page you can see 2019-20 sitting between two navigation arrows. This is new. It used to be, years were under different tabs. Not anymore. The 2019-20 in the year selector means the set of goals we're looking at right now is current year. These are goals in progress. These are the goals that were entered by your current President last year. Don't mess with these! Make SURE to change that selector by advancing to the right to show YOUR year, 20-21. When you go to your year, the look of the goals list is going to change. Watch...

# ROTARY CLUB CENTRAL: GOAL CENTER

ONLY WORK ON YOUR YEAR!! This is how a new year will look.



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



See what happened when we changed to 20-21?

[click] The green "Edit" button turned into a green "Save" and a red "Cancel" button. The goals list grayed out, and...

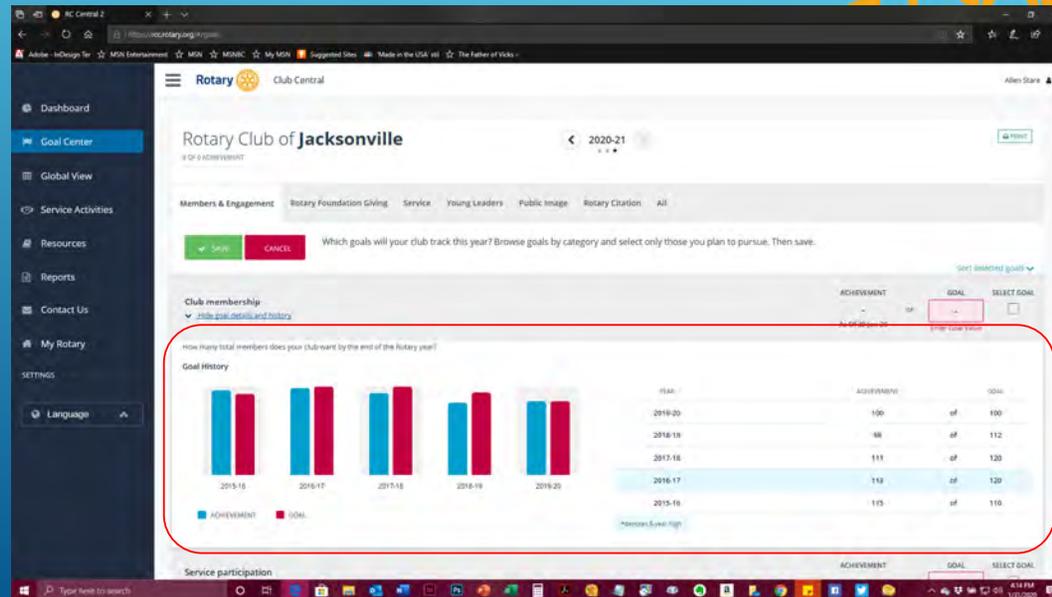
[click] ...you got this alarming red box on the right-hand side labeled GOAL! Next to the red goal box there is also a tick box labeled "Select Goal". This is important to note. You DON'T have to weigh in on every single goal. There are a lot of them! Some goals will never apply to your club. That's okay. If your club never takes an inbound exchange student, there is no reason for you to put a zero in the inbound student goal. Just don't tick it as a selected goal. Only select the goals that your club is going to track and report.

You could go through the item in list form and enter your goals if you know them. But there's more to this list. If you want some context, you have historical data available in the "Show Goal details and History" line under the goal name. You can click it to open up more detail about that particular goal.

Let's go ahead and look more closely at "Club Membership" at the top of the list. You could type in a number at the right and be done with it. Maybe you'd like to see how membership has been trending to help inform your goal selection. Clicking "show goal details and history" expands the edit window, like this...

# ROTARY CLUB CENTRAL: GOAL CENTER

Selecting a Goal opens Goal Details & History. This is "Club Membership" opened.



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



I slid it up a bit so you could see the entire historical bar. This is what it looks like when you open the detail on one of the goals. Now you can see five years of membership data, showing the set goal for each year, the actual achieved each year and the difference. The light blue highlight indicates a five year high in the historical data. You can use this info to help you set your goal.

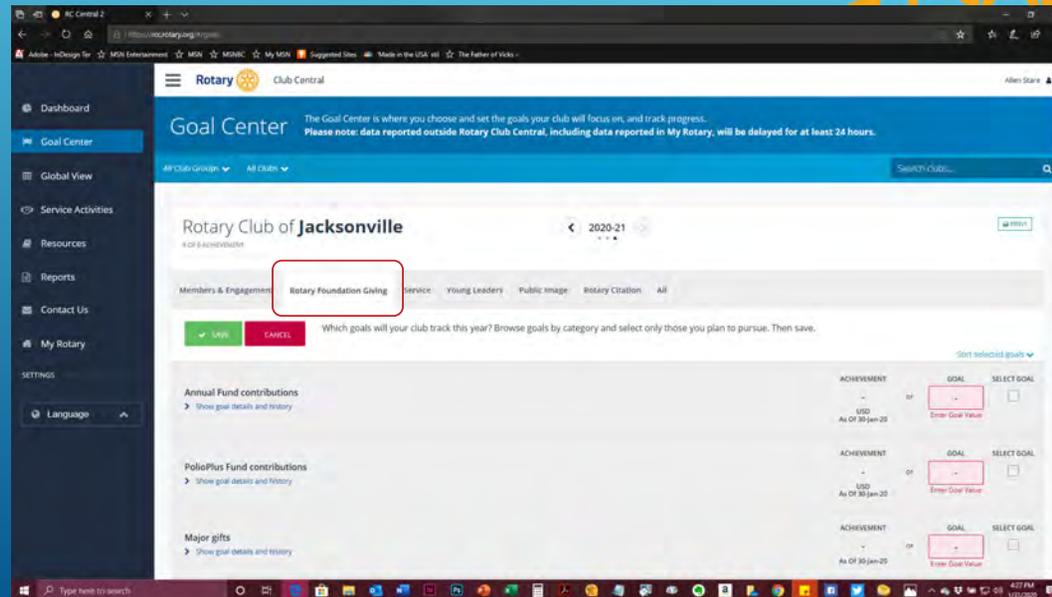
So, you've seen the historical data, you've discussed the goals with your board, you're ready to enter a goal. Type your number in the red box.

And...that's it! You've set a goal in the Goal Center! It's just that easy.

Not that hard, right? This is how you set and report all of your club goals to Rotary International using Rotary Club Central. Keep working your way through the tabs and enter the goals that apply to your club. Let's click one tab over, to Rotary Foundation Giving...

# ROTARY CLUB CENTRAL: GOAL CENTER

Under the Rotary Foundation Giving Tab...



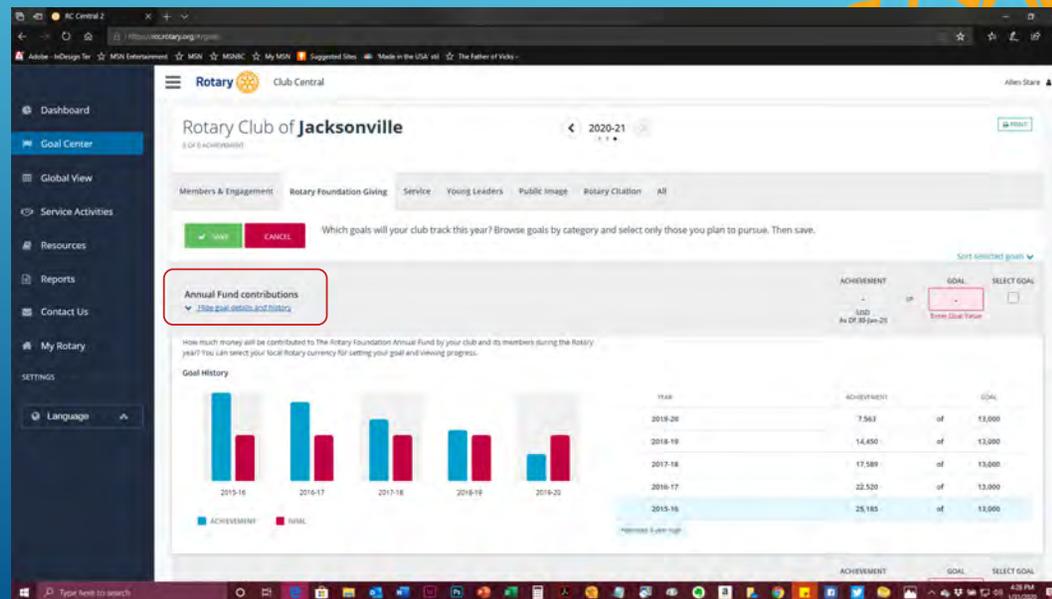
P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



Look familiar? Same layout, same way of entering the goals. Let's drill down a little bit and a look at Annual Fund Contributions details and history...

# ROTARY CLUB CENTRAL: GOAL CENTER

Looking at Rotary Foundation Giving Details & History...



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



There's your historical data on Annual Fund contributions. Same look, same layout, same presentation of the historical data. You can see that Jacksonville hasn't been very creative in our Annual Fund Goal Setting. \$13K each year for a goal...but some years we were wildly over that amount. Something I want to point out...if you don't have a goal set, you can always plug in last year's goal. Having a goal in the space is always better than NOT having one. You can come back and edit later if needed. Again, type in your goal amount, and...bam!...you've just set another goal! See how easy that is? Okay, now that you're a master of the Goal Center, I wanted to give you a look at some of the other tabs in the RCC.

# ROTARY CLUB CENTRAL: GLOBAL VIEW

From Around the World to an AG Area...



Global View shows clubs' collective progress toward each goal worldwide and across your zone, district, and club group. Please note: data reported outside Rotary Club Central, including data reported in My Rotary, will be delayed for at least 24 hours.

Global View Summary

Members & Engagement | 2019-20  
Current Membership: 2877  
as of 30 Jun 2020

GOAL	CLUBS WITH GOAL	2019-20 ACHIEVEMENT	2019-20 GOAL	VIEW CLUB GOALS
Club membership	48 / 48	2077	of 2206	<a href="#">View Club Goals</a>
Service participation	21 / 48	30	of 785	<a href="#">View Club Goals</a>
New member sponsorship	21 / 48	9	of 100	<a href="#">View Club Goals</a>
Rotarian Action Group participation	10 / 48	0	of 71	<a href="#">View Club Goals</a>
Leadership development participation	15 / 48	3	of 73	<a href="#">View Club Goals</a>
District conference attendance	19 / 48	3	of 70	<a href="#">View Club Goals</a>
Rotary Fellowship participation	8 / 48	0	of 18	<a href="#">View Club Goals</a>

P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



Just under the Goal Center you'll see the menu item "Global View". As a club president, Global View is not necessarily something you NEED to access...but it might be fun to have a look. Global View compiles the goal setting numbers for various groups, starting with the entire world. You can see the total of the goals set, and how much of each goal has been completed on a global scale. You can narrow that down to Zone, then to District, and even down to a segment as small as an AG Area within the District.

# ROTARY CLUB CENTRAL: SERVICE ACTIVITIES

From Around the World to an AG Area...

The screenshot displays the Rotary Club Central interface. On the left is a dark sidebar with navigation options: Dashboard, Goal Center, Global View, Service Activities (highlighted), Resources, Reports, Contact Us, My Rotary, and SETTINGS (Language). The main content area is titled 'Morgan County Fair Pavilion' and includes a 'Title and summary' section with a 'PROJECT TITLE' field containing 'Morgan County Fair Pavilion' and a 'PROJECT SUMMARY' field with the text 'Club members volunteered at local fair to serve community food and beverages during Saturday's busiest night of weeklong event.' Below this is a 'Project timeline' section with 'START DATE' (13 Jul 2019) and 'END DATE' (13 Jul 2019) fields, and a 'PROJECT COMPLETE' toggle switch. The bottom of the page shows 'Project metrics'.

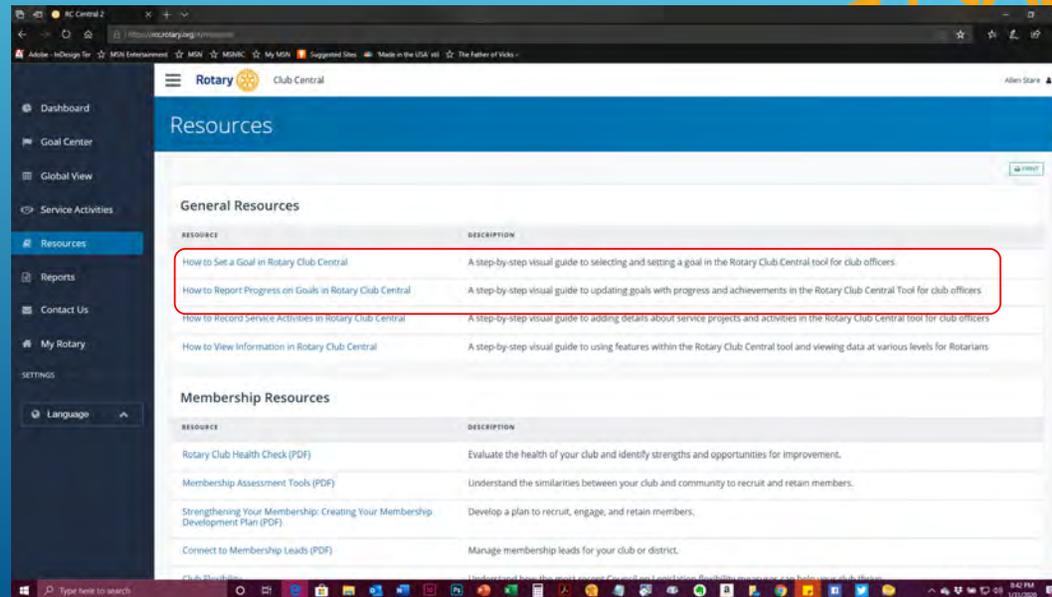
P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



The next selection item is “Service Activities.” This is another place that you can enter valuable club data. If you do a service project of any kind, you can enter it in the “Service Activities” tab in Club Central. This might be a great place to delegate. Let the chair of the service project enter the information about the project. They are going to have the best insight and most accurate data regarding the project. Remember, if they have a My Rotary login, they can get to Club Central. They don’t have to be a President or have any special credentials to see Club Central and service project data.

# ROTARY CLUB CENTRAL: RESOURCES

Articles, handouts, tools, videos and more...



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



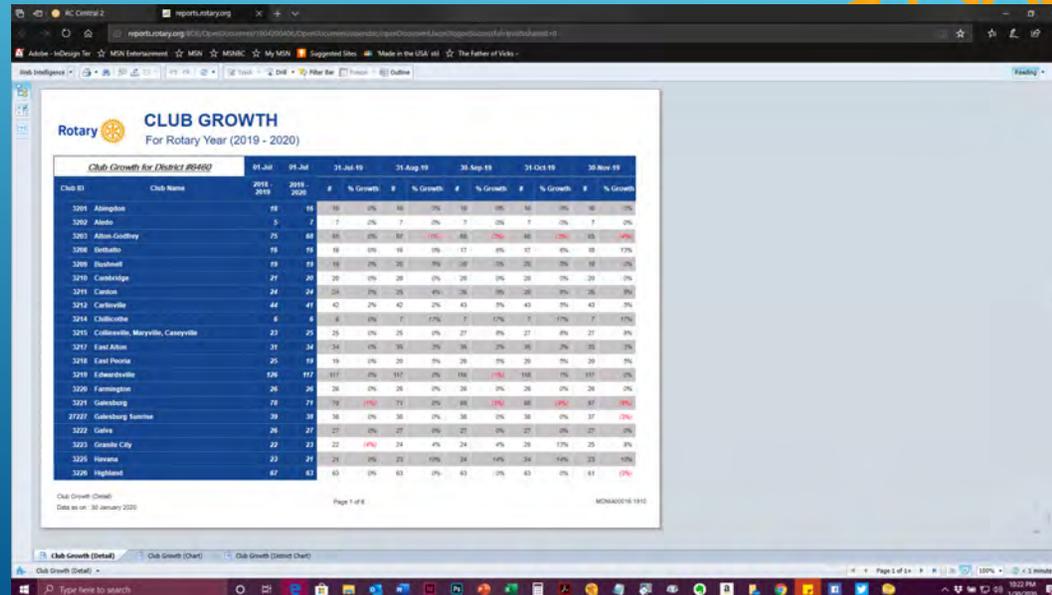
The “Resources” tab is probably self-explanatory. The whole section is a listing of articles, handouts, papers, videos and tools that could be used by any Rotarian, but are especially valuable for club officers. You’ll find Resources for Foundation Giving, a link to the Brand Center, Public Image guidelines...this is a very complete toolbox and many of the things in it will be very handy. You should scan down the list and give a few of the links a click. Oh, and take note...I know you’re hanging on my every word, but if you ever have a question, check out the first two general resources:

[Click] How to Set a Goal in the RCC and how to Report Progress on a Goal in the RCC. Not as much fun as having me

tell you...but the info is there.

# ROTARY CLUB CENTRAL: REPORTS

Pre-rolled Data Reporting for Clubs and District



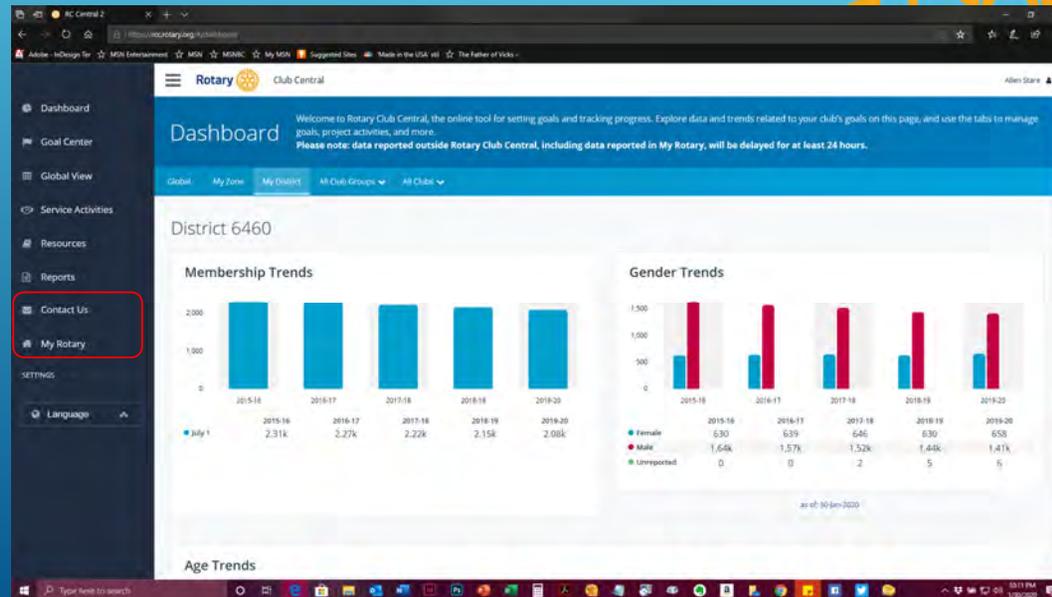
P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



The next tab on the Club Central navigation menu is “Reports.” These are pre-designed reports, ready to go, using data culled from your club or the District. All you have to do is select the topic you want to see a report about, and Club Central does the rest. This is a District 6460 Club Growth Chart for 2019-20. It tracks the percentage of club growth for every month for every club in the District. I pushed one button, and the RCC auto-generated this six page report.

# ROTARY CLUB CENTRAL: CONTACT US

An E-mail form and Phone Nos. for RI



P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central



The final two items on the Dashboard Nav bar are “Contact Us” which generates an e-mail form. It also lists phone numbers for various offices at RI. Then the “My Rotary” button will take you back to My Rotary and close down Rotary Club Central. Make sure you’ve saved your work before you leave RCC. And, that concludes our look at Rotary Club Central and how to Set Goals using RCC. Any questions?

# QUESTIONS?

## GOAL SETTING: HOW DO WE DO IT?

Exploring My Rotary.org and  
Using Rotary Club Central to Set Goals

Presented by:

**Allen Stare**

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P.E.T.S. ORIENTATION: Goal Setting with Rotary Club Central

