

Find Your Passion in Rotary



Mid-Atlantic RLI

MD • DE • DC • WV • TN • VA • NC • SC

A Joint Project of over 410 of Rotary's 535 Districts worldwide

2019-2020 Participant Materials

PART II



Mid-Atlantic RLI

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Division History

Rotary Leadership Institute courses were first offered within the boundaries of Zone 33 in Rotary District 7570 (Western part of Virginia, Eastern Tennessee) in 1997. In 2004, Rotary International Director Ken Morgan appointed representatives to an Executive Committee to establish an RLI presence across the Zone. Led by future Rotary International Vice-President Eric Adamson of Virginia as Executive Committee Chair, the committee of PDG Ken Tillman of Virginia, PDG Jack Porter of West Virginia, PDG Bevin Wall of North Carolina and PDG Sue Poss of South Carolina, and the 2004-05 Governors of each district, established RLI as a multi-district project of all 13 then-Zone 33 Rotary districts, Nos. 7530, 7550, 7570, 7600, 7610, 7670, 7680, 7690, 7710, 7720, 7730, 7750 and 7770. It became the second division established of The Rotary Leadership Institute, after the "Home Division" in the northeast United States. District 7030 in the Southern Caribbean was in the Division from 2005-2013. Districts 7620 & 7630 DC/MD/DE joined after the 2009 Zone expansion. A Board structure was adopted in 2005, with the Institute being led by Chairs Adamson, Wall, PDG Sandra Duckworth, PDG Abe Clymer, PDG Jayne Sullivan, PDG Michael Ellington, and PDG Leigh Hudson. In 2011, a Staff-Policy Board structure was adopted, and Bevin Wall was appointed RLI Executive Director. On his retirement in 2019, there was a return to a Board governance model.

2019-2020 Leadership (all-volunteer)

Mid-Atlantic RLI Board of Directors. *PDG Leigh Hudson (Chair), PDG Lorraine Angelino (Vice-Chair), PP Ed Shearin (Secretary), Rtn. Linda Carducci (Treasurer), PDG Sandra Duckworth, PDG Rod Funderburk, PDG Georgia Oakes, PDG Michael Ellington (Immediate Past Chair), PDG Bevin Wall (Chairman Emeritus), Past RI Vice-President Eric Adamson (Chairman Emeritus)*

RLI Executive Staff. *(All-Volunteer)* Events Chair: PP Bob Stinson

Regional Coordinators. Carolinas East Region (Districts 7710, 7720, 7730, 7770): *PDG Rod Funderburk*, Carolinas West Region (Districts 7670, 7680, 7690, 7750): *P Tim Beck*, Chesapeake Region (Districts 7600, 7610, 7620, 7630): *PDG Roger Harrell*, Mountain-Valley Region (Districts 7530, 7550, 7570): *PDG David Cavender*

District Chairs (Appointed Annually by District Governor of each Member District), District 7545: *PDG Michael Ellington & PDG Harry Faulk*, District 7570: *PDG Woody Sadler*, District 7600: *PP Mary Elmore*, District 7610: *Rtn. Linda Carducci*, District 7620: *PP Sean McAlister*, District 7630: *PDG Jim Roney*, District 7670: *PP Celeste Renaldo*, District 7680: *Rtn. Marcia Scheideman*, District 7690: *PDG Rick Snider*, District 7710: *PP LeeAnn Graham*, District 7720: *Rtn. Anthony Santore*, District 7730: *PP Steve Hellersperk*, District 7750: *PP Renee Stubbs*, District 7770: *PP Tom Ledbetter*.

RLI Faculty & Staff. Many dedicated Rotarians make RLI work. View the "RLI" Page at www.rli33.org or contact Board Chair Leigh Hudson at leighhudson@hotmail.com for more faculty and staff opportunities.

RLI Part II – THE CLUB

TABLE OF CONTENTS

The Rotary Leadership Institute (RLI) is a grass roots, multi-district leadership and Rotary development program using facilitation and activity-based learning in a small group setting to engage Rotarians and strengthen clubs.

RLI is not an official program of Rotary International and is not under its control.

Our Mission: To help Rotarians find their Passion through Rotary, and to engage them to make their clubs stronger.

COURSE MATERIALS

Event Agenda, Faculty, Upcoming RLI Events, Division Leadership, and Welcome Letter are included as a supplement to the course materials or online. Materials are online at www.rli33.org.

	Rotary & Ethics I am ethical, recognize and promote ethics in others, and seek opportunities to serve through my vocation	1
	Strategic Planning & Analysis I can strengthen my club by promoting and leading insightful planning and analysis. Looking at my Rotary club, how can I help make improvements that will matter?	7
	Targeted Service I can lead and promote my club's participation in unique, significant and targeted service opportunities through our Foundation. Understand the key concepts of Rotary programs!	25
	Attracting Members I can lead and promote my club's reexamination of its distinctive position in my community and the quality of members we attract. I want to work with the best people!	33
	Team Building I can lead and promote my club's collaboration in effective and motivated groups to accomplish our goals of service. Harness the real power of Rotary clubs and Rotarians!	41



Rotary & Ethics

I am ethical, recognize and promote ethics in others, and seek opportunities to serve through my vocation

Session Goals

How should the Guiding Principles of Rotary strengthen me in my vocation?

How can I promote Rotary and Rotary ideals within my vocation?

Materials

Insert RE-1: Good to Know for Rotary & Ethics

Insert RE-2: Guiding Principles of Rotary

Insert RE-3: Vocational Service Ideas

Find out more at <https://goo.gl/KmcS1q> or QR scan:

This is a course in the Rotary Membership Spiral going across the three days of RLI. Prior courses include My Club & Beyond and Engaging Members. Other courses in this section include Attracting Members. Additional courses building on this session include Club Communications. Leadership and Service have separate spirals.



Session Topics

- 1) Business Ethics Roleplay
ABC Manufacturing Company is a publicly held company. The company is one of the larger, well-established manufacturers of “widgets” and related items across a large geographic area. [For the purposes of this roleplay, “widgets” represent a generic manufactured good]. Some widget industry competitors are doing well in this economy and others are not. Management and shareholders in recent meetings have expressed concern about the direction of the company after 12 straight quarters of not meeting sales projections and generally declining stock prices. In recent Board meetings, it has remained unsettled as to what issues there are, and what, if any, actions are appropriate. Management is a mix of persons who have been with the company a long time, including the CEO, and some newcomers.

“Example- good or bad- is contagious...”

If we set a good example, seeing us, others may do likewise.

All of us have more influence than we sometime suppose.”

*1966-67 RI Pres. Richard L. Evans
— The Appearance of Things
THE ROTARIAN, May 1967*



- a. Board Meeting of the ABC Manufacturing Company

Agenda

- i. Opening Remarks
 - ii. Recognize Board Members and Roles
 - iii. Committee Reports
 - iv. Recommendations
 - v. Next Steps
 - vi. Adjourn
- b. What is at the core of these problems?
- c. Is it systemic or functional?
- d. Are the problems addressed by the Board recommendations?
- e. What are the ethical issues?

- 2) Review Insert RE-2: Guiding Principles of Rotary.

- a. 4 Way Test
 - i. Would using the 4 Way Test change any of the recommendations?
 - ii. Would making the 4 Way Test the measuring stick during committee and Board meetings have changed the course of the discussions?
- b. Rotary Code of Conduct
 - i. Discuss and determine how your section applies to the ABC Manufacturing Company's issues.
 - ii. Is the Rotary Code of Contact section reviewed by your group relevant to your work or civic challenges today?

- 3) What kind of vocational service activities could be done in your club to promote Rotary Ideals and Ethics?




Insert RE-1: Good to Know for Rotary & Ethics

- Ethics can be defined as (1) a set of moral principles, a theory or system of moral values, (2) the principles of conduct governing an individual or a group, or (3) a guiding philosophy. From Merriam-Webster.com
- Rotary was not born in Chicago in the early part of the twentieth century because the city was awash in goodwill and concern for others. Quite the opposite was true. The concept of “business ethics” in Chicago at the time was considered an oxymoron. The principles of Rotary were a reaction to the unethical business climate of the era.
- Rotary founder, Paul Harris, believed that standing for ethical behavior in business and professions set Rotary apart from every other social club of the era.
- Although Paul Harris founded Rotary, many other people put their mark on Rotary in those early years, including fellow Chicagoan, Arthur Sheldon.
- Harris devoted nearly an entire chapter of his second book to Sheldon, who moved to Chicago after graduating from college, but found himself appalled by the business ethics that dominated Chicago, or rather lack of business ethics. He abruptly quit a good job because of the unethical things his employer expected of him.
- Sheldon argued that, not only can ethical business people survive in a community filled with unethical businesses, but they can prosper. Given a choice, people will always choose someone that they can trust. Advocated by Harris, this principle quickly became a core element in Rotary philosophy, and remains so today.
- As Rotary developed, early Rotary leaders tried to balance guiding principles that did not always agree. Rotary was originally conceived as a service organization that brought business people and professionals together to improve their community through club actions and through a shared commitment to ethical conduct in all aspects of their lives. All community leaders who adhered to these values were welcome, regardless of their religion.
- To create a harmonious environment for the fellowship that held clubs together, Rotary discouraged religious and political positions. However, the commitment to ethical conduct is essentially a commitment to “the golden rule”, which is a nearly universal religious principle.
- By the 1930’s Paul Harris worried that the golden rule probably needed to be abandoned by Rotary to avoid religious overtones, but doing so would deny a core value of Rotary. The solution was the Four-Way Test.
- The preceding reprinted from [The Rotary Global History Fellowship website](#).



Insert RE-2: Guiding Principles of Rotary

<p style="text-align: center;">The Object of Rotary</p> <p>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:</p> <p><u>FIRST</u>. The development of acquaintance as an opportunity for service;</p> <p><u>SECOND</u>. 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;</p> <p><u>THIRD</u>. The application of the ideal of service in each Rotarian's personal, business, and community life;</p> <p><u>FOURTH</u>. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.</p>	<p style="text-align: center;">The Five Avenues of Service</p> <p>Based on the Object of Rotary, Rotary's Philosophical cornerstone and foundation of a club's activities:</p> <p><u>Club Service</u> focuses on strengthening fellowship and ensuring the effective functioning of the club.</p> <p><u>Vocational Service</u> encourages Rotarians to serve others through their vocations and to practice high ethical standards.</p> <p><u>Community Service</u> covers the projects and activities the club undertakes to improve life in its community.</p> <p><u>International Service</u> encompasses actions taken to expand Rotary's humanitarian reach around the globe and to promote world understanding and peace.</p> <p><u>Youth Service</u> recognizes the positive change by youth & young adults via leadership and involvement.</p>
<p style="text-align: center;">The Four-Way Test</p> <p>From the earliest days of the organization, Rotarians were concerned with promoting high ethical standards in their professional lives. One of the world's most widely printed and quoted statements of business ethics is The Four-Way Test, which was created in 1932 by Rotarian Herbert J. Taylor (who later served as RI president) when he was asked to take charge of a company that was facing bankruptcy.</p> <p>This 24-word test for employees to follow in their business and professional lives became the guide for sales, production, advertising, and all relations with dealers and customers, and the survival of the company is credited to this simple philosophy. Adopted by Rotary in 1943, The Four-Way Test has been translated into more than a hundred languages and published in thousands of ways. It asks the following four questions:</p> <p>"Of the things we think, say or do:</p> <ol style="list-style-type: none"> 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?" 	<p style="text-align: center;">Rotary Code of Conduct</p> <p>As a Rotarian, I will</p> <ol style="list-style-type: none"> 1. Act with integrity and high ethical standards in my personal and professional life 2. Deal fairly with others and treat them and their occupations with respect 3. Use my professional skills through Rotary to mentor young people, help those with special needs, and improve people's quality of life in my community and in the world 4. Avoid behavior that reflects adversely on Rotary or other Rotarians <div style="text-align: center;">  </div>



Insert RE-3: Vocational Service Ideas

1. Advancing high ethical standards in the workplace
 - a. In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
 - b. In internal communications, praise and encourage exemplary behavior on and off the job.
 - c. In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.
2. The classification principle
 - a. Classification talks to promote vocational awareness in your club.
 - b. Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
 - c. Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.
 - d. Schedule an occasional meeting in a member's place of employment.
 - e. Invite young people to special vocational meetings.
3. Promote Rotary's commitment to high ethical standards
 - a. Post The Four-Way Test on a prominent billboard in your community.
 - b. Display The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or work space and talk about it.
 - c. "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
 - d. Sponsor a Four Way Test essay contest.
 - e. Sponsor a joint "character literacy" project for young children.
 - f. Conduct a RYLA event with special emphasis on ethics.
 - g. Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.
4. Recognize and promote the value of all useful occupations
 - a. Make classification talks and business tours part of your club's program.
 - b. Join or form a Rotary Fellowship related to your vocation.
 - c. Sponsor a career day for Rotarians to bring young people to their businesses.
 - d. Support professional development
 - e. Encourage members to take leadership roles in business associations.
 - f. Sponsor a seminar for small business entrepreneurs.
 - g. Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
 - h. Start a career counseling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.
5. Volunteer your vocation
 - a. Mentor a young person/ send to Rotary Leadership Institute (RLI).
 - b. Use Rotary Ideas or Rotary Showcase at Rotary.org to identify a project in need of your specialized vocational skills.

Modified by RLI from An Introduction to Vocational Service 255-EN (1009)



Strategic Planning & Analysis



I can strengthen my club by promoting and leading insightful planning and analysis

Session Goals

Analyze Your
Rotary Club
Review Possible
Areas of
Improvement
Discuss How
Specific
Improvements
Should be Made
Understand the
Process for
Strategic Planning

Materials

Insert SPA-1: Good to Know for Strategic Planning & Analysis
Insert SPA-2: Rotary Club Self-Evaluation of Performance & Operations
Insert SPA-3: Strategic Planning Guide. *EN (109)*
Insert SPA-4: Rotary's 5 Year Strategic Plan 2019
Next Page: The Strategic Planning Cycle
Find out more at <https://goo.gl/xG4D69> or QR scan:

This is a course in the Leadership Spiral going across the three days of RLI. Prior courses include The Roots of Rotary. Other courses in this session include Team Building. Additional courses building on this session are Public Image & Public Relations and Effective Leadership Strategies. Service and Membership have separate spirals.



Session Topics

- 1) Why is a self-evaluation by a Rotary club important for the club? Why is it an important exercise for the Rotarians within the club?

“Action without vision is wasted, and vision without action is just a dream.

Action with vision brings hope to the world.”

1996-97 RI Pres. Luis Vicente Gay
— Address to 1996 Rotary
Convention,
Calgary, Alberta, Canada



- 2) In your groups, review the Self-Evaluation assigned section Insert SPA-2: Rotary Club Self Evaluation and agree on an item in need of improvement. Use as basis to complete Questions 1 & 2 on Insert SPA-3: Strategic Planning Guide and Worksheet

- a) Where are we now?

- b) Where do we want to be?

- 3) Based on your previous Self-Evaluation result “areas of improvement”, start to complete Question 3. “How do we get there?”

- 4) Rotary International has a Strategic Plan. (See Insert SPA-4). What is the relation of the RI Strategic Plan to your club’s strategic plan? How can you use it in your club’s strategic planning process?

- 5) How do we communicate our strategic plan to our club? Is board, club, or key member “buy-in” more important? How often does the plan need to be reviewed? Can the plan be changed? How?

“...There is so much pleasure in Rotary activities. The [regular meetings] bring you into contact with your fellow members. Their diverse interests and knowledge stimulate your interest in your community...The planning for service projects both close by or across some distant horizon carries us out of our own self-interest into the wonderful world of service to others... [and the] pleasing paradox...that we grow in stature when we give of our time and talent to improve the quality of life for someone else. How strange that when we give dignity to someone else, we grow in dignity ourselves...”

1989-90 RI Pres. Hugh M. Archer

— *Enjoy Rotary!*

THE ROTARIAN, July 1989





Insert SPA-1: Good to Know for Strategic Planning & Analysis

- "Strategic Planning", defined. A systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them. BusinessDictionary.com
- In contrast to "long-term planning" (which begins with the current status and lays down a path to meet estimated future needs), strategic planning begins with the desired-end and works backward to the current status. BusinessDictionary.com
- Rotary International (RI) has had a Strategic Planning Committee continuously since 2004.
- RI recommends strategic planning to Rotary clubs.
- Rotary clubs are autonomous and develop their own goals and plans.
- RI provides strategic planning resources, including a strategic planning guide and worksheet for clubs.
- Think of a Strategic Plan as a "guidance tool".
- Think of a Strategic Plan as a "work in progress".
- In the process of Strategic Planning, look for disagreements and toward the future.
- Focus on the organization and key stakeholders, not individual actions.
- Sometimes it is best to have an "outsider" lead a strategic planning process since they are not "invested" in the various positions and cliques within a club.
- Professional and volunteer strategic planning resources may be known and identified in your district. The District Trainer in your district may be able to refer you to some resources. Also, the Rotary Coordinator and their team (Zone-level) may have some resources available.



Rotary Club Self-Evaluation of Performance and Operations

This form is to conduct a self-evaluation and review of your club's current performance and operations. It is NOT intended to "grade" your club, but rather provide a mechanism to discover the strengths of your club and identify areas that might be improved. Many questions will require a degree of reasonable appraisal. Please be guided by the Four Way Test and your best judgment in answering the questions.

Club Administration

Score

Please rate the following: Yes= 5 pts No=0 pts Don't Know = DK

1. Our Rotary Club has adopted the Club Leadership Plan. _____
2. The club has written By-laws that are available to each member. _____
3. The club Board of Directors meets on a regularly announced basis. _____
4. The club has developed both a long-term and short-term plan of action. _____
5. The club has a website or social media page with current information on it. _____
6. The official Rotary International Directory is available to the members. _____
7. The club publishes a roster listing the officers, members, committees and chairs. _____
8. The club plans social events for members and partners throughout the year. _____
9. The club makes an effort to contact absent or ill Rotarians _____
10. The club has received a RI Presidential Citation within the last 3 years. _____
11. The club has an annually prepared budget that is approved by the members. _____
12. The club receives a financial report of all income and expenses at least once a year. _____

Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don't know= DK

13. The club meeting location site or area is _____
14. The food provided during the meal at the club meeting is _____
15. The quality of speakers and club programs are normally _____
16. The meetings start and finish on time and the use of an agenda is _____
17. The Board of Directors report to the club about their actions is _____
18. The club's communication of important Rotary information to the members is _____



19. The payment of club dues by the members in a timely fashion is _____
20. The payment of district and International dues in a timely fashion is _____
21. The information and content of the club newsletter/bulletin/website is _____
22. The club's use of sound systems, lecterns, decorations, flags, banners and other Rotary related items are _____
23. The operation of the club committee system with regards to meeting regularly and reporting to the board of directors and/or the membership is _____
24. The club's promotion of district assemblies, conferences, conventions and special meetings are _____
25. The club's use of RI Themes and knowledge of the RI President's message and initiatives are _____
26. The club's greeting and treatment of visiting Rotarians is _____
27. The special recognition given to visiting guests during club meetings is _____
28. The information and topics presented at a club assembly is _____
29. The club's treatment and reception of the District Governor's official visit is _____
30. Fellowship encouraged by the use of singing, "happy dollars," raffles, etc. is _____
31. The degree of Rotary spirit and friendly fellowship that exists in the club is _____
32. The club's efforts to recognize special individuals with "Rotarian of the Year", "Citizen of the Year", etc. is _____
33. The desire of the Rotarians to sit at a different table each week is _____
34. The club's recognition of special events, birthdays etc of the members is _____

Please rate the following:

35. Our club has a speaker **at all meetings** (5 pts), **monthly** (3 pts), **never** (0 pts). _____
36. The club newsletter/website is published/updated **for all meetings** (5 pts), **monthly** (3 pts), **never** (0 pts). _____
37. The club holds regular club assemblies **monthly** (5 pts), **quarterly** (3 pts) **semi-annually** (1 pt), **never** (0 pts). _____
38. The Rotary International/ Club rules on attendance are **always** (5 pts), **usually** (4pts), **occasionally** (3 pts), **seldom** (2 pts), **never** (1 pt) enforced. _____
39. The club members are **always** (5 pts), **usually** (4 pts), **occasionally** (3 pts), _____



- seldom** (2 pts), **never** (0 pts) reminded to make-up for absences _____
40. The club gives special recognition **regularly** (5 pts), **occasionally** (3 pts), **once in a while** (1 pt), **never** (0 pts) to individuals who have perfect attendance. _____
41. My club has sponsored a District Governor candidate within the last **1-5 yrs** (5pts), **6-10 yrs** (4 pts), **11-15 yrs**, (3pts), **16+ yrs** (0 pts), don't know (DK). _____
42. My club has provided an Assistant Governor (AG's) candidate within the last **1-5 yrs** (5 pts), **6-10 yrs** (3 pts), **never** (0), don't know (DK). _____
43. The following number of Rotarians from my club attended the last Rotary International Convention- **5+** (5 pts), **3-4** (4 pts), **1-2** (2 pts), **zero** (0 pts), don't know (DK). _____
44. The following number of Rotarians from my club has attended the most recent district conference- **10 +** (5 pts), **5-9** (4 pts), **2-4** (3 pts), **1** (2 pts), **none** (0 pts). _____
45. The following number of club leaders attended the most recent district assembly- **5+** (5 pts), **2-4** (3 pts), **1** (1 pt), **none** (0 pts), don't know (DK). _____
46. Generally **10 or more** (5pts), **5-9** (3 pts), **1-4** (1 pt), **no** (0 pts), Rotarians from my club attends special functions (i.e. dinners, seminars, service events, celebrations, etc) sponsored by the district. _____
47. The current president-elect **always** (5 pts), **sometimes** (3 pts), **seldom** (1 pt), **never** (0 pts) attends PETS (president-elect training seminar). _____

Please add the totals points for questions 1-47 Club Administration _____
Don't knows _____

Membership

Please rate the following:

1. The average monthly club attendance figure is **90-100%** (5 pts), **80-89%** (4 pts), **70-79%** (3 pts), **60-69%** (2 pts), **50-59%** (1 pt), don't know (DK) _____
2. The average age of the club membership is **35-40** (5 pts), **41-50** (4 pts), **51-60** (3 pts), **61-70** (2 pts), **71+** (1 pt), don't know (DK). _____
3. Last year, the club's membership- **increased** (5 pts), **remained the same** (3 pts), **decreased** (0 pts), don't know (DK). _____
4. This year the club membership is likely to **increase** (5 pts), **remain the same** (3 pts), **decrease** (0 pts), don't know (DK). _____
5. The club has sponsored a new club within the **last 1-3 yrs** (5 pts), **4-8 yrs** (4 pts), **9-12 yrs** (2 pts), **longer or never** (0 pts), don't know (DK). _____
6. When a member relocates to another community, the club **always** (5 pts), **sometimes** (3 pts), **never** (0 pts) notifies the nearest Rotary club or RI of the move. _____



7. New members are **always** (5 pts), **sometimes** (3 pts), **never** (0 pts) encouraged to become active in the club _____
8. The club **frequently** (5 pts), **often** (4 pts), **seldom** (2 pts), **never** (0 pts) holds special membership drives (cocktail, wine & cheese parties, meet & greet, networking event, etc) to identify and attract potential new members. _____
9. The club **always** (5 pts), **sometimes** (3 pts), **seldom** (1 pt), **never** (0 pts) has information or materials about joining Rotary at its fund raisers or events. _____

Please rate the following: Yes= 5, No= 0, Don't know= DK

10. The club has an active membership chair that makes regular reports to the club. _____
11. The club has and uses a membership classification system. _____
12. The club has developed a membership interest survey form. _____
13. The club assigns new members to committees based on their interests. _____
14. The club annually sets measurable and reasonable membership goals. _____
15. The club has and uses a "Mentoring" program. _____
16. The club has developed a welcoming package for new Rotarians. _____
17. The club has a special program (red badge, greeter, etc.) to make new members feel welcome. _____
18. The club conducts new member orientation meetings _____
19. The club pays for new Rotarians to attend the Rotary Leadership Institute. _____
20. The club conducts an "exit interview" to determine why members leave. _____
21. The club systematically asks each new member for a referral. _____
22. The club provides non-Rotarian speakers with information about Rotary. _____

Rate the following: Excellent=5, Good=4, Satisfactory= 3, Fair=2, Poor=1, Don't know= DK

23. The club's promotion of membership issues is _____
24. The club's use of the classification list is _____
25. The club membership balance and representation of the community business segments and general population are _____
26. The club's attempts to invite qualified members of any race, gender or ethnic group to join the club is _____



- Please add the total points for questions 1-33**
- | | |
|--------------------|-------|
| Membership | _____ |
| Don't knows | _____ |

Page 14



- Please add the total points for questions 1-22**
- | |
|--------------------------|
| Foundation_____ |
| Don't knows _____ |

Rate the following: Excellent=5, Good= 4, Satisfactory= 3, Fair= 2, Poor=1, Don't know= DK

- Page 15



4. The club's efforts to promote high ethical standards, professional dignity or service performance in the club and community are _____
5. The club's effort to conduct one new community service project each year is _____
6. The club's efforts to conduct one new international service project each year is _____
7. The club's use of input, talents and resources of the members for service projects is _____
8. The club's use of input, talent and resources from community leaders for service is _____
9. I consider the club's activities regarding service, locally and internationally, to be _____
10. The club has conducted an active program or project in the following areas

Please credit 3 pts for each service project that your club has done *within the last 3 years*

- _____ Drug use prevention or rehabilitation
- _____ Polio eradication or other community immunization project
- _____ Environmental activities
- _____ Literacy projects
- _____ Clean water programs
- _____ Providing food for the hungry
- _____ Assisting the community's handicapped or elderly
- _____ Providing health or medical care locally or internationally
- _____ Providing recreational opportunities for the community
- _____ Helping the poor or needy of the community
- _____ Improving the community's economic or social quality of life
- _____ Conducting career opportunity programs
- _____ Assisting or guiding the youth of the community
- _____ Creating or supporting a Rotaract or Interact Club
- _____ Working with other local service groups on a common project
- _____ Work with other Rotary clubs on a common project
- _____ Work with community educational facilities
- _____ Traffic or highway safety programs or projects
- _____ Animal safety or care programs
- _____ Disaster assistance program or project
- _____ Others

Total points for question 10 _____

Please rate the following: Yes = 5 No= 0, Don't know= DK

11. The club conducts various fund raisers to support its service programs. _____
12. The club relies mainly on financial contributions from the members to fund its service programs. _____
13. The club has participated in an International Service project within the last 2 years. _____
14. The club participates actively in the Youth Exchange Program. _____



15. The club regularly invites the local Youth Exchange students to its meetings. _____
16. Club Rotarians routinely act as the host parents for the visiting Youth Exchange _____
17. The club is aware of and planning to institute or cooperate with the mandated “Background Checks” for the Youth Exchange program. _____
18. The club annually recognizes outstanding students or student leaders _____
19. The club sponsors at least 1 International Service project a year. _____
20. The club participates in or recognizes the Rotary UN day at the United Nations headquarters. _____
21. The club has participated within the last 3 years in a Rotary Friendship Exchange. _____
22. Within the last 3 years, the club has participated in a Twin Cities, Sister Club, or Matched Club program with 1 or more Rotary clubs around the world. _____
23. The club, within the last 3 years has sponsored a student(s) with a Rotary Youth Leadership Award (RYLA). _____

Please add the total points for questions 1-23 Service Projects _____
Don't knows _____

Rotary Publicity and Public Relations

1. Our club **always** (5 pts), **often** (3 pts), **seldom** (1 pt) **never** (0 pts) has articles or pictures of our activities in the local media. _____
2. Our club **always** (5 pts), **often** (3 pts), **seldom** (1 pt), **never** (0 pts) uses the Public Access channels or the internet to promote or publicize our activities. _____
3. The members of the club **always** (5 pts), **often** (4 pts), **seldom** (1 pt), **never** (0 pts) wear their Rotary pins. _____
4. Our club has **many** (5 pts), **some** (3 pts), **one** (1 pt) **no** (0 pts) road signs at the entrances to the community announcing the day, time and location of our meeting. _____
5. When the club provides financial support to other organizations, it **always** (5 pts) **often** (4 pts), **seldom** (1 pt), **never** (0 pts) asks the other organization to publicize the donation in the local media. _____

Please rate the following: Yes= 5pts No= 0 pts Don't know=DK

6. Our club has a visible sign that “Rotary Meets Here” at our meeting site. _____
7. The club has used advertising (billboards, newspapers, community brochures, etc. within the last 2 years. _____



8. Local Rotarians have been interviewed about the club on radio or TV within the last year. _____
9. Representatives from the media are active members of the club. _____
10. The club has a brochure describing the club and its projects available for handout. _____
11. The Rotary logo and club identification is visible for completed community service projects. _____

Please add the total points for questions 1-11 Rotary Public Relations _____
Don't knows _____

Please forward the totals for all the questions to the last page

Bonus Questions

1. I receive the Rotarian magazine each month. (Y=5, N=0) _____
2. I have received or am familiar with the District Governor's e/newsletter. (Y=5 N=0) _____
3. I have brought in a new member to the club within the last 2 years. (Y=5 N=0) _____
4. I understand the SHARE System of The Rotary Foundation. (Y=5, N=0) _____
5. I am a Paul Harris Fellow or a Sustaining Member. (Y=5, N=) _____
6. I have worked on or contributed to service project within the last 2 years. (Y=5 N=0) _____
7. I visit the club, district or Rotary International websites **daily** (5 pts), **weekly** (4 pts)
monthly (3 pts), **occasionally** (2 pts), **never** (0 pts) _____
8. I **always** (5 pts), **sometimes** (3 pts), **never** (0 pts) make-up for a missed meeting. _____
9. I, personally have served on a district committee within the last **1-5 yrs** (5 pts),
6-10 yrs (3 pts), **longer or never** (0 pts). _____
10. I, personally attended the district conference or International convention within
the last year (5 pts), **2-5 yrs** (3 pts), **longer than 5 yrs** (1 pt), **never** (0 pts) _____
11. I have contributed to The Rotary Foundation within the last **1 year** (5 pts),
2-3 years (3 pts) **4 years or more** (1 pt), **never** (0 pts). _____

Please forward the total points for questions 1-11 to the last page total _____



Scoring

	<i>Your score</i>	<i>DK's</i>
Club Administration (47 questions)	_____ out of 235 points	_____(38)
Membership (33 questions)	_____ out of 165 points	_____(29)
The Rotary Foundation (22 questions)	_____ out of 110 points	_____(10)
	<i>Your score</i>	<i>DK's</i>
Rotary Service (23 questions)	_____ out of 173 points	_____(22)
Publicity & Public Relations (11 questions)	_____ out of 55 points	_____(6)
Bonus Points (11 questions)	_____ out of 55 points	
Total points	_____ out of 793 points	
Total Don't Knows (DK)	_____ out of 105 questions	

Grand Total

- 700 points plus = Outstanding
- 600-699 points = Excellent
- 500-599 points = Very Good/Average
- 400-499 points = Could be improved
- 300-399 points = Caution- club may need assistance
- less than 300 points – The club is in need of serious and immediate assistance

Please do not make any adjustments to the total point final figure for the DK's. . The following is for reference only.

1-10 DK's = 5 to 50 additional points - **Normal**

11-20 DK's = 55 to 100 points – **Caution-** should be concerned about the lack of knowledge about your club.

21-35 DK's = 105 to 175 points – **Critical-** you need to learn more about your club.

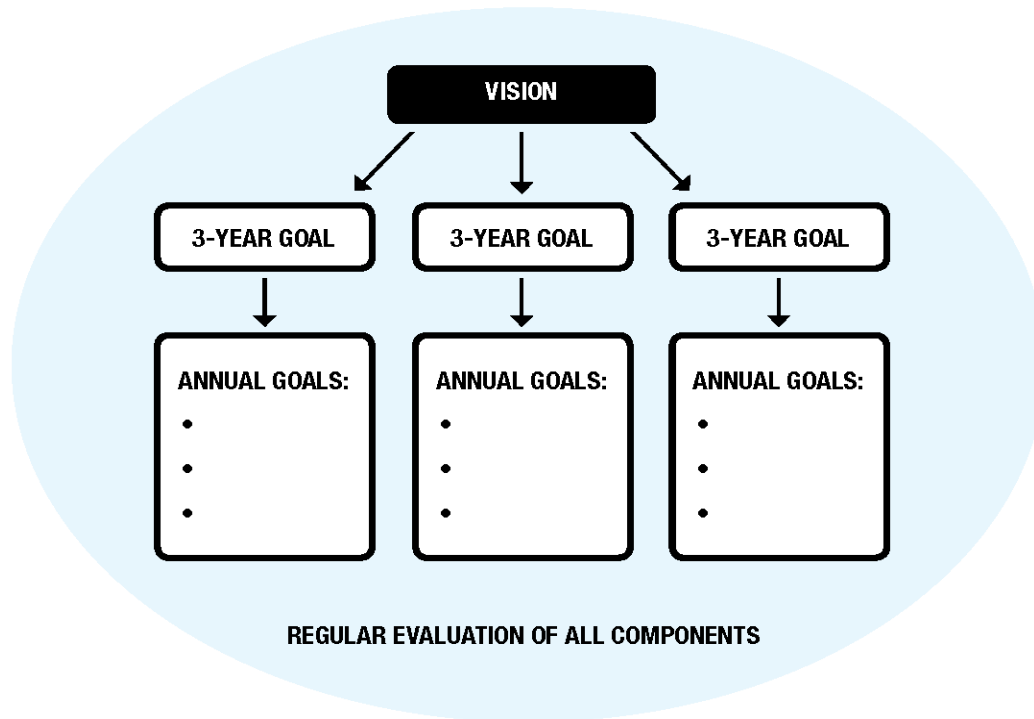
36 or more – **Unacceptable-** Unless you're a new member, you need to seriously learn more about the functioning of your club.

This is a non-weighted, unscientific analysis of your club and the results should only be used to identify areas that either you or the club might be lacking. It should not be taken as a negative reflection on the activities of the club or its Rotarians.

A “clean copy” of this survey for duplication is contained online at www.RLI33.org.



Insert SPA-3: Strategic Planning Guide (3 pages)



The Strategic Planning Model

Strategic planning involves creating a vision, with supporting goals that can be regularly evaluated and adjusted as needed.

Process

A strategic plan can be developed by completing the process below. Use the accompanying worksheet to record your ideas.

1. Where are we now?

- Describe your club's current state.
- Brainstorm your club's strengths and weaknesses.

2. Where do we want to be?

- Create a list of 5-10 characteristics that you would like to see in your club three years from now.
- Draft a one-sentence vision statement describing your club three years from now.
- Finalize the vision statement, making sure that all participants support it.

3. How do we get there?

- Brainstorm three-year goals that will help your club achieve the vision, considering:
 - Strengths and weaknesses of the club
 - Programs and missions of RI and its Foundation
 - Involvement of all members
 - Achievability in three years

- Prioritize the three-year goals based on participant consensus. As a group, decide on the top two or three goals that will have the greatest impact as your club works toward the vision.
- Identify annual goals that support each of the top three-year goals.
- Determine the deadlines, resources, and people necessary for meeting the first annual goal for each of the three-year goals.

4. How are we doing?

- Create a strategic planning team to regularly monitor progress and recommend revisions to the plan.
- Allocate sufficient resources for the plan's implementation.
- Evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
- Review the strategic plan annually, including the vision statement, three-year goals, and annual goals, and revise as needed.
- Repeat the full strategic planning process every three years to create a new plan or affirm the current one.



Strategic Planning Worksheet

Use the process outlined on the previous page to complete this worksheet and create your strategic plan.

1. Where are we now? _____

Today's date: _____

Describe your current state:

Strengths:

Weaknesses:

2. Where do we want to be? _____

Target date: _____

Key characteristics of future state:

Vision Statement:



In order to reach the vision, the following goals must be achieved:

Note: There is no limit to the number of three-year or annual goals for your strategic plan.

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

List the actions that you will take to follow up on implementation of the plan:

[illegible]



Insert SPA-4: Rotary's 5 Year Strategic Plan 2019

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.

Mission Statement

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

Action Plan

As People of Action, we share a strong sense of purpose. More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—and shares the vision of a better world. As People of Action, we understand that fulfilling that vision requires a plan. This is Rotary's plan for the next five years: to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt. By helping to realize the goals of this plan, you ensure a stronger and even more effective future for Rotary—a tremendous legacy. Our plan is rooted in our tried-and-true values and builds on the remarkable capabilities and spirit of Rotarians. It is clear-eyed about the challenges that Rotary and the world face. It protects the value of human connection in an age of technology. It lays out a path for bringing great ideas to the forefront of the global imagination of what's possible. And our plan will provide us with a continuity of vision from year to year, keeping us moving toward fulfilling our shared purpose. This is our Action Plan.

Priorities

PRIORITY 1- Increase Our Impact

People of Action are effective problem-solvers. Let's seek out new ways to translate our expertise into making a difference—in our communities and across the globe. Let's prove that our impact on the world has only just begun.

PRIORITY 2- Expand Our Reach

People of Action activate and inspire one another. Let's build connections and opportunities that will allow people who share our drive to do the same.

PRIORITY 3- Enhance Participant Engagement

People of Action strive to understand the needs of others. Let's recommit to putting the needs, expectations, and growth of our participants at the center of all we do.

PRIORITY 4- Increase Our Ability to Adapt

People of Action are inventive, entrepreneurial, and resilient. Let's stay true to ourselves and stay ahead of change in our next 115 years.



Targeted Service (Foundation II)



I can lead and promote my club's participation in unique, significant and targeted service opportunities through our Foundation.

Session Goals

Review the Rotary Foundation Funding Model

Discuss the importance of the Rotary Foundation Funding Model to your club

Discuss the Importance of the Six Areas of Focus and Sustainability

Materials

Insert TS-1: Good to Know for Targeted Service

Insert TS-2: SHARE Flowchart

Insert TS-3: Targeted Service Case Studies

Insert TS-4: Rotary Foundation Funding Model Flowchart

Insert TS-5: Areas of Focus Chart

Insert TS-6: What is Sustainability?

Find out more at <https://goo.gl/aP6v8f> or QR scan

This is a course in the Service Spiral going across the 3 days of RLI. Prior courses include Our Foundation and Creating Service Projects. Additional courses building on this session are Vocational Service Expectations and International Service. Leadership and Membership have separate spirals.

While this course and others within RLI discuss Rotary Foundation topics and the programs of our Foundation, you should consult your district for specific Rotary Foundation educational & training opportunities.



Session Topics

- 1) Review Insert TS-1: Good to Know in particular, the mission of our Rotary Foundation.
- 2) Briefly discuss major categories of activities generally funded through the Rotary Foundation.
 - a) Humanitarian Aid
 - b) Educational Programs
 - c) Vocational Training
 - d) Youth Programs



3) Show Me the Money – A Visual Representation of the Rotary Foundation SHARE Process

- a) Donations “Money In”
 - i) Annual Fund
 - ii) Rotary’s Endowment
 - iii) Restricted Funds
- b) Expenditures “Money Out”
 - i) PolioPlus
 - ii) Global Grants
 - iii) District Grants

4) Case Study Experts Insert TS-3: Targeted Service Case Studies

- a) Insert TS-4: Rotary Foundation Funding Model Flowchart
- b) Insert TS-5: Areas of Focus Chart
- c) Insert TS-6: What is Sustainability?

5) How does the SHARE Program benefit your club and district?

6) Why are partnerships with other organizations significant?

7) How can participation in the Rotary Foundation help a club’s public image?

8) How can an understanding of the mechanics of the Rotary Foundation encourage you as a member of your Rotary Club to participate and contribute in order to do good in the world?

9) How can the Rotary Foundation Funding Model encourage Rotarians to participate and contribute? Can the Funding Model help a club’s public image?

Rotarians have long been doing service in support of peace, health, education, and the alleviation of poverty to further the mission of The Rotary Foundation.

The [New Grant Model] further focuses these efforts in a few key areas of demonstrated Rotarian interest to create more opportunities to collaborate with other organizations and achieve greater worldwide exposure for the work of Rotarians and their Foundation.

*1996-97 RI Pres. Luis V. Giay
The Future Vision Plan of The
Rotary Foundation- June, 2008*



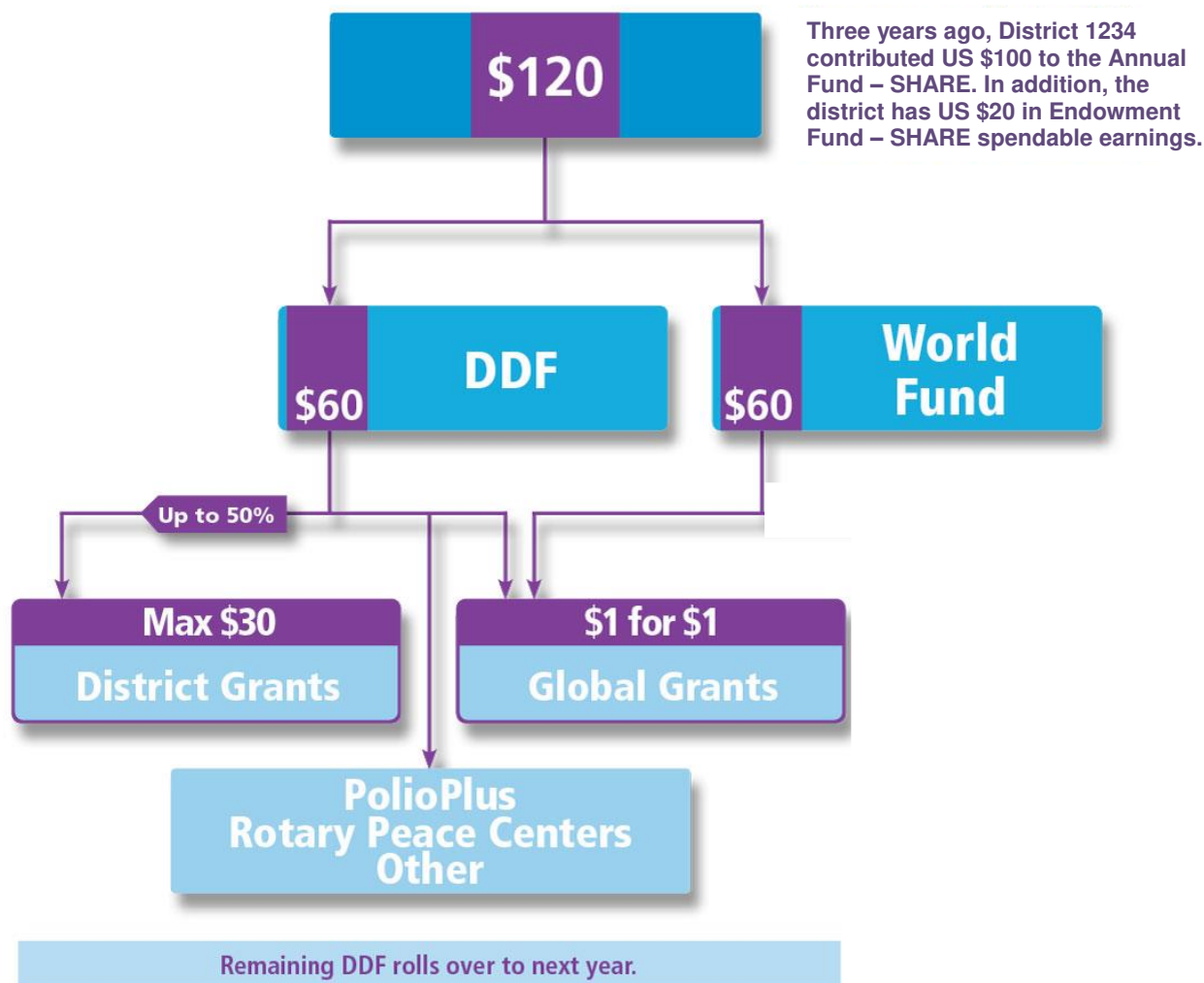
Insert TS-1: Good to Know for Targeted Service

- The Mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.
- The Learning Center at [Rotary.org](https://www.rotary.org) contains self-paced courses and webinars on Service and Grants topics, with links to specific and regularly updated resources.
- MyRotary (member-only, secured site at [Rotary.org](https://www.rotary.org)) also has Discussion Groups on related topics, Rotary Showcase and Rotary Ideas (crowdfunding) sites.
- A “community assessment” is the process of examining a community’s strengths, weaknesses, assets, gaps, and needs to determine which issues should be addressed, existing resources to address identified gaps, and the best course of action to address identified needs.
- “Sustainability” is the ability to operate a project or program on its own without support from Rotary. Sustainability is often used as a measure of a project’s long-term effectiveness.
- A “cooperating organization” is any reputable organization or academic institution that provides expertise, infrastructure, advocacy, training, education, or other support for a humanitarian initiative.
- District Resources include your District Rotary Foundation Chair, the District Grant Chair and the events that they hold during the year. Please see your district website for more information at www.Rotary_ _ _ .org. (Insert your four digit district number)



Insert TS-2: SHARE Flowchart

SHARE System



THE DETAIL. How does the SHARE System work? Annual Fund contributions are invested for a three year period. In the third year, the money is divided 50/50 between the district and the World Fund (WF). The district's part of the funds are called "District Designated Funds" (DDF). Districts can use up to 50% of their DDF to pay for club and district projects through District Grants. The remaining DDF may be used for Global Grants or donated to PolioPlus, the Rotary Peace Centers, or another district. If DDF is not used in a given year, then it accumulates in the district's account and may only be used thereafter for Global Grants. World Fund contributions are used to match Global Grants. The World Fund matches DDF (1:1), and cash (0.50:1), for contributions to a Global Grant. District Grants can be any amount while Global Grants must be at least US\$30,000. Additionally, the World Fund is reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund.



Insert TS-3: Targeted Service Case Studies

Case Study A

John and Mary come to live in a new country where they do not speak the local language. They find it difficult to fit into the community. They attend the local schools but have limited resources for individual language training. Their parents speak only their native language increasing the sense of isolation for the whole family.

This is one family but there are many families with the same issues in the community. Your Rotary Club has decided to supply bilingual dictionaries as needed to all the local schools. It is determined that there are 300 students in the schools in the 5th grade. Each dictionary costs US \$5.

Conduct small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

Each group reports back to the whole group on each question explaining their reasoning for their answers.

Case Study B

The residents of Patari, a village in Uttar Pradesh, are among 25 million people in India who suffer the consequences of fluorosis, an irreversible condition caused by elevated levels of fluoride in drinking water. The painful effects of fluorosis can include bone deformities, calcification of ligament and tendons, and osteosclerosis (abnormal bone density). Dental effects include mottling and erosion of tooth enamel. The fluoride, because of its strength, rots teeth and destroys bones. Your district would like to work with the district in India to provide fluoride filters to 60 families in Patari through a Rotary Foundation grant-funded project. The US \$40,000 project also provided toilets, safe drinking water, and hygiene training to eight schools serving about 2,300 students in Uttar Pradesh.

The World Health Organization estimates that almost one-tenth of global disease could be prevented by improving the water supply, sanitation, hygiene, and the management of water resources. As the Indian villages demonstrate, the solution requires a targeted approach, including assessments of each community's needs.

Small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

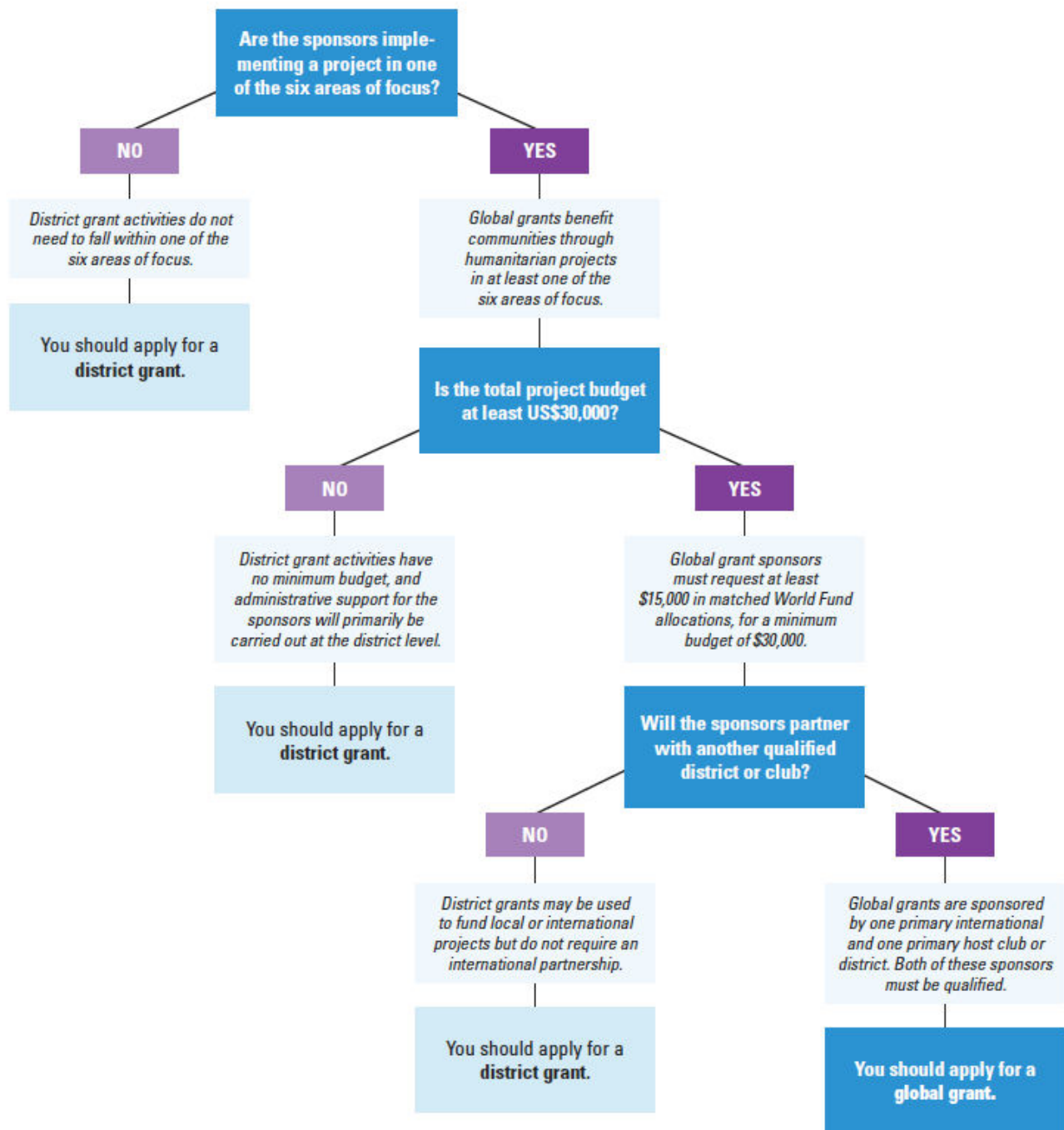
Each group reports back to the whole group on each question explaining their reasoning for their answers.



Insert TS-4: Rotary Foundation Funding Model Flowchart

Determining a Grant Type for a Humanitarian Project







A district/club is interested in a **humanitarian project**. The following questions can help Rotarian sponsors determine whether to apply for a global grant or a district grant.



Ref: TRF Training Workbook



The Rotary Foundation Areas of Focus

TRF MISSION	The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of <i>health</i> , the support of <i>education</i> , and the <i>alleviation of poverty</i> .					
						
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
STATEMENT OF PURPOSE	The Rotary Foundation promotes the practice of peace and conflict prevention/resolution by:	The Rotary Foundation reduces the causes and effects of disease by:	The Rotary Foundation ensures that people have sustainable access to water and sanitation by:	The Rotary Foundation improves the lives of mothers and their children by:	The Rotary Foundation promotes education and literacy for all by:	The Rotary Foundation invests in people to create measurable and enduring economic improvement in their lives and communities by:
GOALS	<p>Strengthening local peace efforts</p> <p>Training local leaders to prevent and mediate conflict</p> <p>Supporting long-term peace-building in areas affected by conflict</p> <p>Assisting vulnerable populations affected by conflict, particularly children and youth</p> <p>Supporting studies related to peace and conflict resolution</p>	<p>Improving the capacity of local health care professionals</p> <p>Combating the spread of HIV/AIDS, malaria, and other major diseases</p> <p>Enhancing the health infrastructure of local communities</p> <p>Educating and mobilizing communities to help prevent the spread of major diseases</p> <p>Supporting studies related to disease prevention and treatment</p>	<p>Increasing equitable community access to safe drinking water and basic sanitation</p> <p>Strengthening the ability of communities to develop and maintain sustainable water and sanitation systems</p> <p>Educating communities about safe water, sanitation, and hygiene</p> <p>Supporting studies related to water and sanitation</p>	<p>Reducing the mortality rate for children under the age of five</p> <p>Reducing the maternal mortality rate</p> <p>Improving access to essential medical services and trained health care providers for mothers and their children</p> <p>Supporting studies related to maternal and child health</p>	<p>Ensuring that children have access to quality basic education</p> <p>Reducing gender disparity in education</p> <p>Increasing adult literacy</p> <p>Strengthening the capacity of communities to support basic education and literacy</p> <p>Supporting studies related to basic education and literacy</p>	<p>Strengthening the development of local entrepreneurs and community leaders, particularly women, in impoverished communities</p> <p>Developing opportunities for decent and productive work, particularly for youth</p> <p>Building the capacity of local organizations and community networks to support economic development</p> <p>Supporting studies related to economic and community development</p>

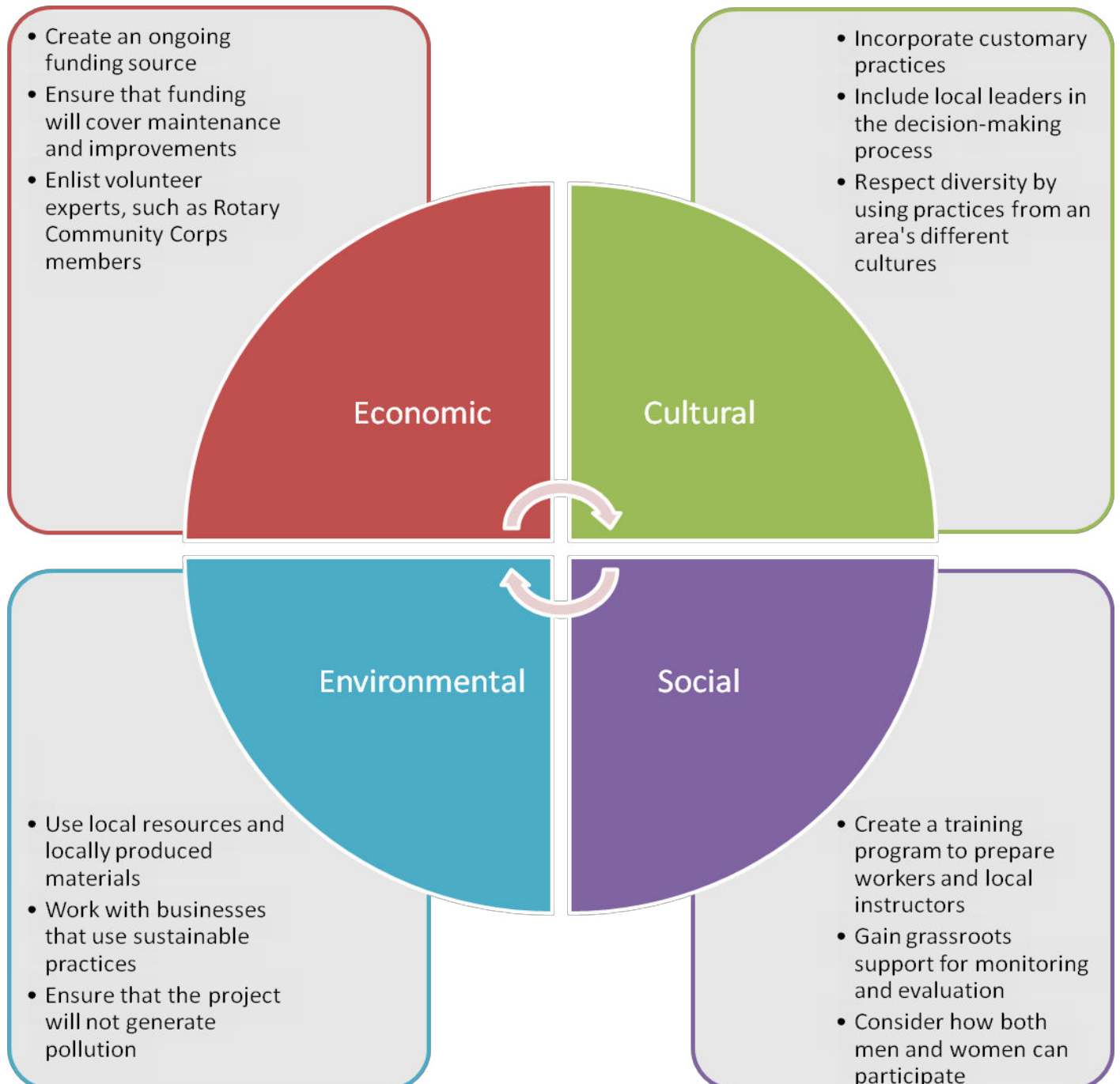


Insert TS-5: Areas of Focus Chart



Insert TS-6: What is Sustainability?

The word sustainable often describes something that is environmentally friendly. But environmental concerns are just one aspect of sustainability. Economic, cultural, and social factors are equally important. When a humanitarian project addresses all four levels of sustainability, it has a better chance of producing long-term benefits for the community it serves. Here are examples of ways to incorporate sustainability into your next project. [From *The Rotarian*, Feb. 2012]





Team Building

I can lead and promote my club's collaboration in effective and motivated groups to accomplish our goals of service

Session Goals

Explore How Committees and Team Building are used in Rotary Clubs

Discuss the Advantages and Disadvantages of Committees

Examine Committees as a Tool of Leadership

Materials

Insert TB-1: Good to Know for Team Building

Insert TB-2: Club Coat of Arms Exercise

Insert TB-3: Urbana University of Illinois Exercise

Insert TB-4: Exercise Follow-Up

Next Page: Club Committee Structures

Find out more at <https://goo.gl/wWiKs9> or QR scan:

This is a course in the Leadership Spiral going across 3 days of RLI. Prior courses include The Roots of Rotary. Other courses in this session include Strategic Planning & Analysis. Additional courses building on this session are Public Image & Public Relations and Effective Leadership Strategies. Service and Membership have separate spirals.



Session Topics

1) Debate Exercise

Resolved: The most effective committee is a committee of one.

Modified Debate Format

3 min	Affirmative 1	State your case
3 min	Negative 1	Tear down the case
3 min	Affirmative 2	Rebut, rebuild case, add advantages
3 min	Negative 2	Continue to tear down case
2 min	TIMEOUT	
1 min	Negative 1	Summarize
1 min	Affirmative 1	Summarize
1 min	Negative 2	Conclude
1 min	Affirmative 2	Conclude

You are [busy people]; were not such the case you would not be Rotarians; but remember that the [chair] of your division is a busy [person], and he has made himself busier than ever by the assumption of the duties of his [position]... In this, as in all other things, let us work together, because to do so is to be Rotarian.

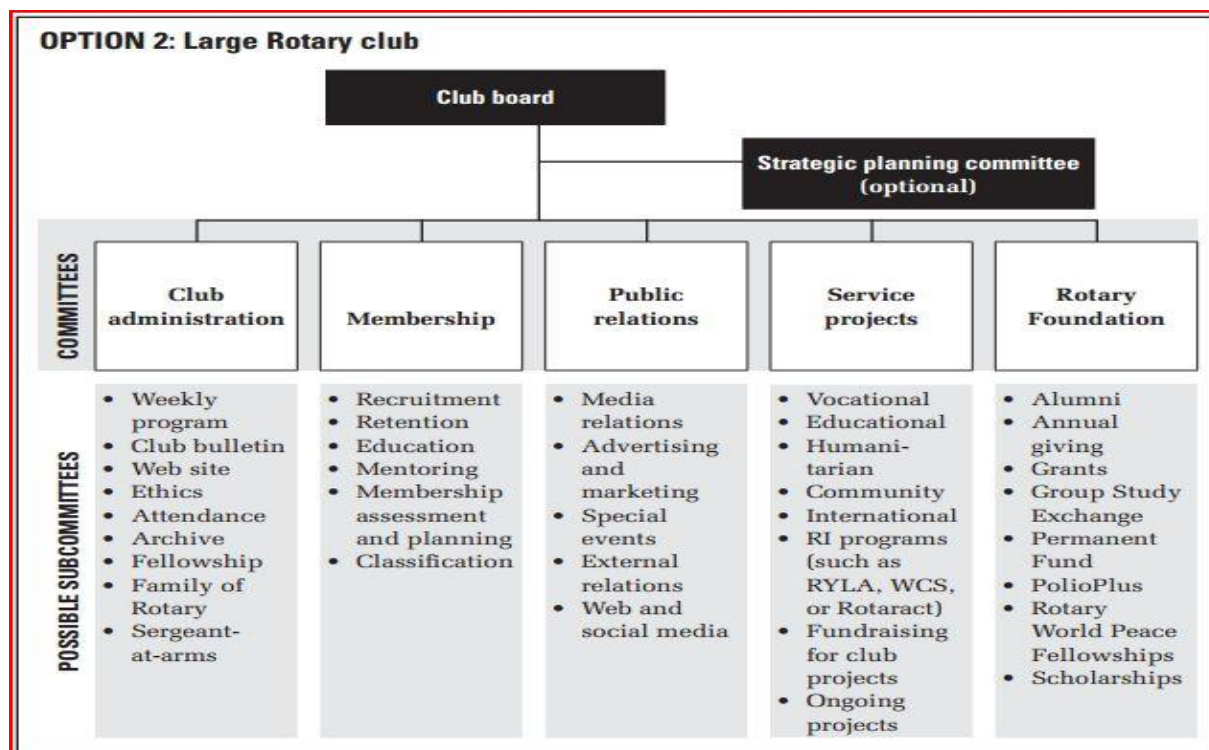
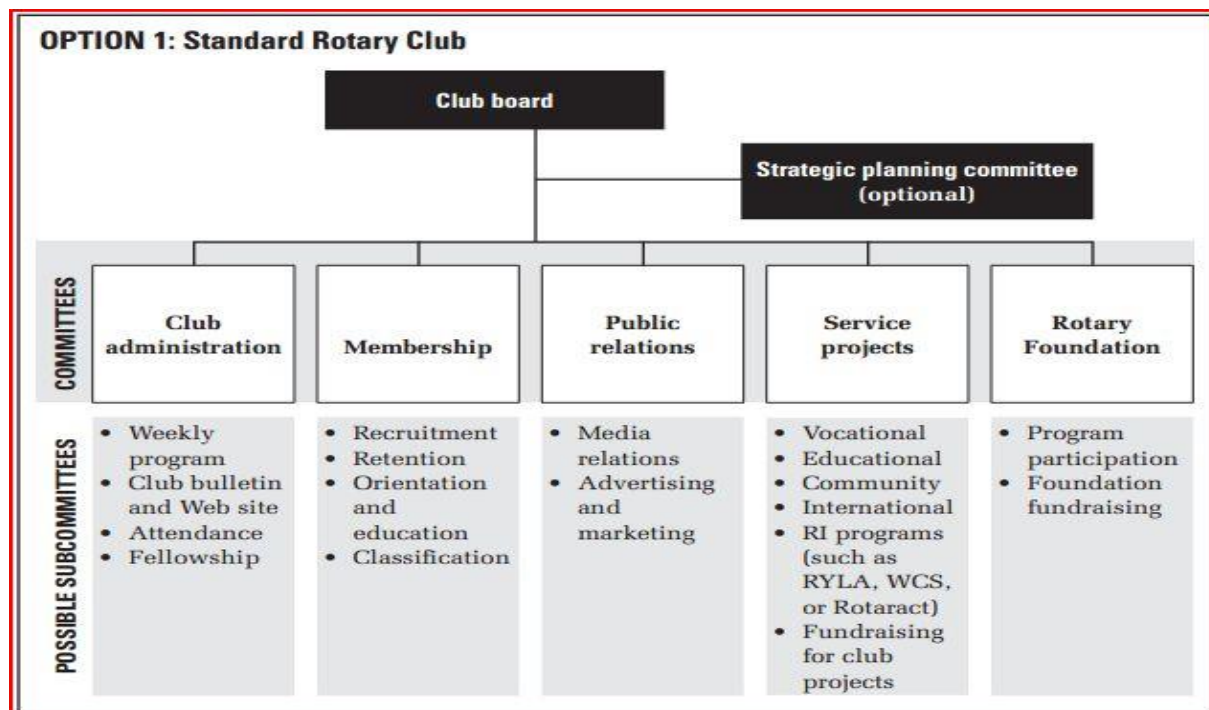
Paul P. Harris
Founder of Rotary
— Messages from the President
January 1912



- 2) Club Coat of Arms Exercise (Insert TB-2) or Urbana University Exercise (Ins. TB-3)
- 3) How can we make effective use of Rotarian teams and committees? How important is delegation of tasks and duties?

Club Committee Structures

(from Club President's Manual, Appendix A)





Insert TB-1: Good to Know for Team Building

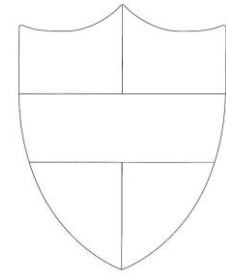
- Rotary Clubs and the committees within clubs are teams, just like in business, sports or other endeavors.
- The organization of a club, i.e., its committee structure, is completely up to the club to determine. There are several alternative recommended committee structures by Rotary for clubs to consider. Clubs should pick or design a committee structure that matches their personnel and dynamic.
- "Individual commitment to a group effort--that is what makes a team work, a company work, a society work, a civilization work." --*Vince Lombardi*
- "Talent wins games, but teamwork and intelligence win championships." --*Michael Jordan*
- "Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results." --*Andrew Carnegie*
- "Alone we can do so little, together we can do so much." --*Helen Keller*
- "Remember, teamwork begins by building trust. And the only way to do that is to overcome our need for invulnerability." --*Patrick Lencioni*
- "I invite everyone to choose forgiveness rather than division, teamwork over personal ambition." --*Jean-Francois Cope*
- "None of us is as smart as all of us." --*Ken Blanchard*
- "Coming together is a beginning. Keeping together is progress. Working together is success." --*Henry Ford*
- "The strength of the team is each individual member. The strength of each member is the team." --*Phil Jackson*
- "Collaboration allows teachers to capture each other's fund of collective intelligence." --*Mike Schmoker*
- "It takes two flints to make a fire." --*Louisa May Alcott*
- "Unity is strength. . . when there is teamwork and collaboration, wonderful things can be achieved." --*Mattie Stepanek*
- "The best teamwork comes from [people] who are working independently toward one goal in unison." --*James Cash Penney*



Insert TB-2: Club Coat of Arms Exercise

Goal: To create a Rotary Club Coat of Arms and Heraldry

Materials: Use the blank shield on the next page or draw on flip chart pads.



Time: Groups have 20 minutes to create their Rotary Club Coat of Arms and 15 minutes are recommended to review the follow up questions.

Exercise: The class should be divided into groups. Instructions should be read by the Facilitator and limited to the precise instructions below. Groups should be spaced apart and work independently from each other.

Instructions: Heraldry is the practice of designing, displaying, describing and recording a coat of arms. It is a system of identification that is a very personal and unique form of individual or group expression. A coat of arms is used to illustrate specific characteristics, deeds, accomplishments or traits that are important to the individual or organization. The term "Blazon" comes from the German "To blow the horn." At a tournament, the "herald" would sound the trumpet and it was their duty to explain the meaning of the shields or "coat of arms" to the other participants. Thus "blazon" meant to "describe a shield in words using heraldic terms."

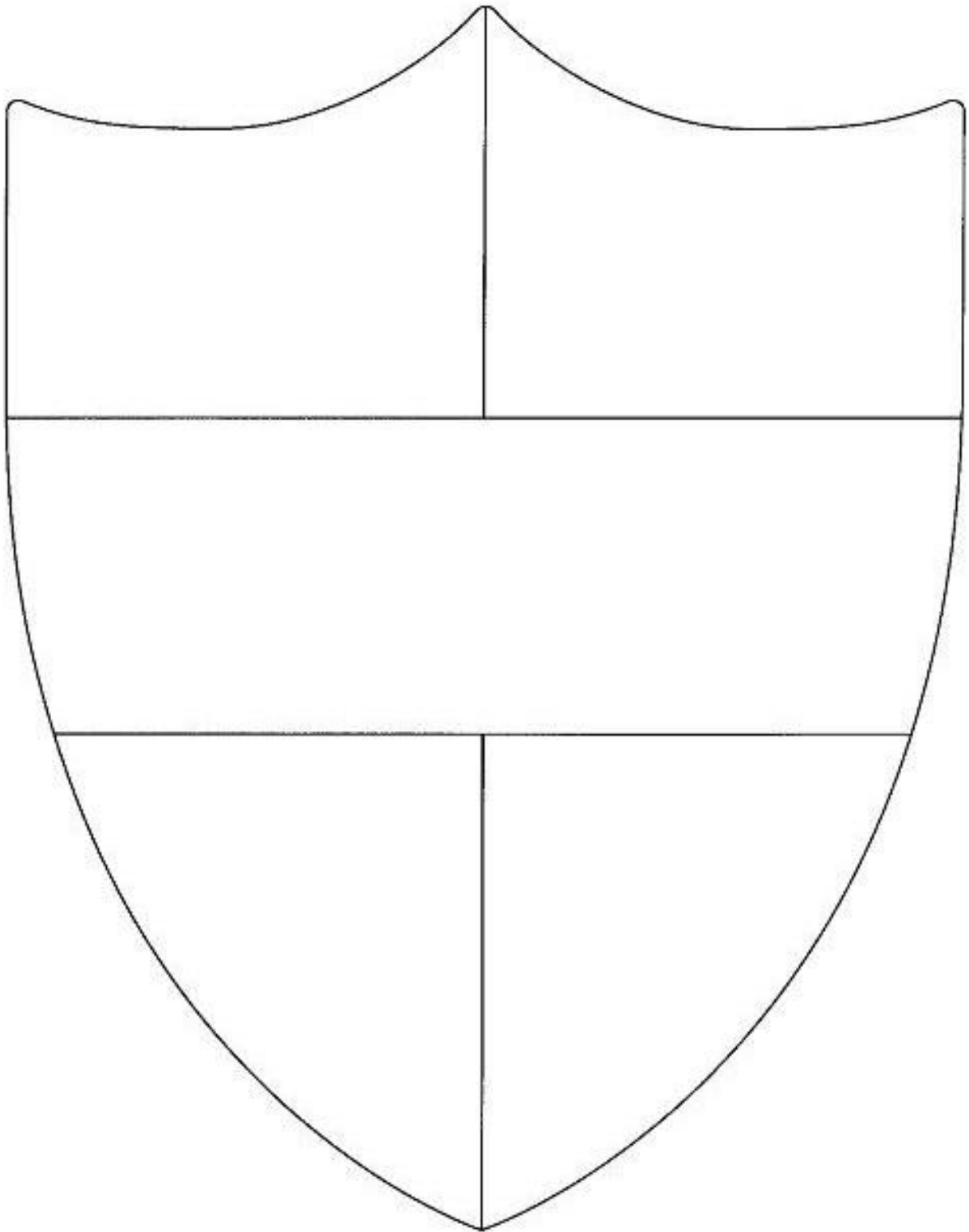
The goal is to design, develop and explain a Rotary coat of arms and heraldry. The students are not limited to using the enclosed blank shield and may design a coat of arms in whatever manner they wish. However, all items, symbols, colors or designs must be explained and relevant to Rotary, their clubs or districts.

Note that the artwork, colors and designs do not have to be perfect. But they need to be clear enough so they can be explained and so the class can understand the concepts represented.

After teams have had a chance to display and explain their coats of arms, the follow up questions and group discussion will be led by the Facilitator.



Club Coat of Arms





Insert TB-3: Urbana University of Illinois Exercise

Background:

The Club began six months ago with 4 leaders who had become impressed with Rotary through Polio Plus activity and results. They started meeting weekly on Wednesdays at 5:30 and agreed amongst themselves that they would bring together a strong group of leaders like themselves within the next year. The four took on the offices of President, Vice President, Secretary, and Treasurer. To date they have recruited 26 new members. Within a month, a community service project was being accomplished each month. These projects were being so well accomplished by the team of 4 that new members were recruited by each new project. Each Club meeting was a planning meeting for next month's project or a speaker from the community describing a specific need. New members were put in charge of certain parts of the service projects. As members became excited about what the Club was able to accomplish, they started to recommend their friends for membership.

New members were also recruited from the Club program speakers.

Current Situation:

In two weeks they will install and welcome 10 more members. But the group of four are getting overwhelmed with everything. So President Jack told the other officers, "we need to build an effective team to help carry the leadership load. I am appointing a committee to come up with a recommendation on how we can build a team".

Assignment:

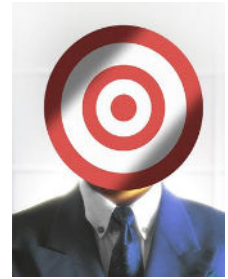
In the next 15 minutes, develop a recommendation on how this club can build a team. What specific steps do they need to follow?



Insert TB-4: Exercise Follow-Up

After completing the chosen exercise, facilitate the following questions among the groups.

- How was the team leader chosen?
- Was a team leader necessary?
- How were the different symbols, colors and designed agreed upon?
- What special talents did any team member have that helped the process?
- What methods were used to resolve conflicts?
- How collaborative was the group effort, or did one or two people decide
- How was the team spokesperson chosen?
- What discussions were used in understanding the goal. Was everyone clear on the objective?
- How did the time element play in the final decisions that were made?
- What could the team have done to become more effective in its final product?
- How does this exercise relate to committee or team activities at the club level?



Attracting Members

I can lead and promote my club's reexamination of its distinctive position in my community and the quality of members we attract

Session Goals

Identify My Club's Target Audience and Profile

Define the Attributes of the Target Audience

Explore How My Club Can Attract the Target Audience

Materials

Insert AM-1: Good to Know for Attracting Members

Insert AM-2: Club Profile Sheet

Insert AM-3: The Membership Process Chart

Insert AM-4: The Club Membership Committee

Find out more at <https://goo.gl/r8ndb5> or QR scan:

This is a course in the Membership Spiral going across 3 days of RLI. Prior courses include My Club & Beyond, and Engaging Members. Other sessions in this course include Rotary & Ethics. An additional course building on this session is Club Communications. Service and Leadership have separate spirals.



Session Topics

- 1) What are people looking for in a service club?
- 2) Complete the AM-2: Club Profile Sheet. What does this tell you about your club?
- 3) What signature projects and/or events is your club known for in your community?
- 4) If there are other Rotary clubs or service clubs nearby, how are they different than your Rotary club?
- 5) Value Proposition Exercise
 - a. As a group, discuss the results of your answers to the preceding questions.
 - b. Choose common characteristics to create a description of your groups' collective club's strengths and weaknesses.

*"When a tree stops growing
— it is ready to die...."*

A Rotary club is like that: It is moving ahead only when it is growing. When the growing ends, the knife-and fork club begins."

*1957-1958 RI Pres. Charles G. Tennent
— Little Lessons in Rotary (Third Edition), March 1978*



- c. Identify and discuss this club's Value Proposition.
- 6) Does your Rotary club have a "target audience"?
- 7) Who should be invited to be a member of your Rotary club? Why?
- 8) What about your club would be attractive to that "target audience"? Name one thing I can suggest to my club that it can do to attract its "target audience"?



Insert AM-1: Good to Know for Attracting Members

- The concept of “attracting members” is that a Rotary club should be vibrant and known in their community, and therefore that it should be attractive to prospective members.
- Membership in a Rotary club is by proposal of a member and invitation by the club. You have to “ask”!
- Rotary clubs are members of the association called Rotary International and subject to its charter and bylaws (unless modified) requirements regarding membership.
- Rotary clubs select their own members, but are subject to the laws of their jurisdiction and Rotary policies on membership.
- The 2016 Council on Legislation, “Rotary’s Congress” passed several changes allowing clubs to decide what works best for them in the area of attracting members. Some of the changes:
 - Clubs can decide to vary their meeting times.
 - Clubs decide whether to meet online or in person.
 - Clubs decide when to cancel a meeting, as long as they meet at least twice a month.
 - Clubs can provide that a service activity or other club function can serve as a meeting.
 - Clubs have flexibility in choosing their membership rules and requirements.
- Replaced the previous six membership criteria from the RI Constitution with a simple requirement that a member be a person of good character who has a good reputation in their business or community and is willing to serve the community.
- Rotary continues to promote “New Generations” policies that are targeted toward introducing younger persons to Rotary, including making Rotary membership more convenient and affordable.
- Women constitute less than 25% of Rotarians in North America. Women have been eligible to join Rotary since 1989.



Insert AM-2: Club Profile Sheet

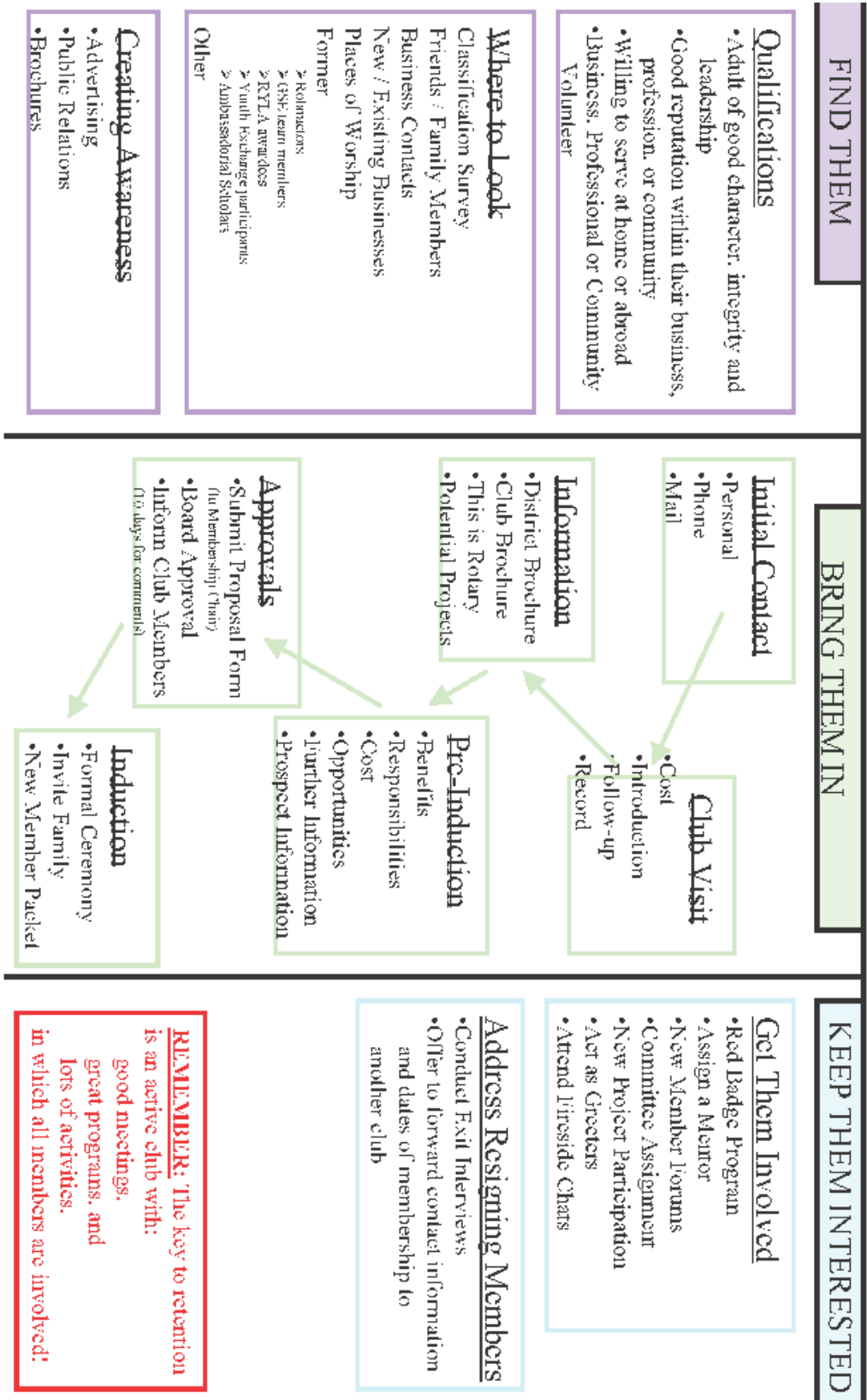


# of Members	_____	<i>Instructions: 1, 2, 3, low to high</i>	
Average Age	_____		
How Active?	1	2	3
How Expensive?	1	2	3
How Exclusive? (versus easier to Join)	1	2	3
How Much Fun?	1	2	3
How Effective in Local Service?	1	2	3
How Effective in Global?	1	2	3
How Prestigious?	1	2	3
How Effective in Networking?	1	2	3
How Much Help to Others in the Club?	1	2	3
How Much Family Involvement?	1	2	3
How Much Leadership Development?	1	2	3
How Much Publicity?	1	2	3



Insert AM-3: Membership Process Chart

THE MEMBERSHIP PROCESS



In all of the above it is critical to get buy in from the club on goals and to identify who is responsible for each activity.

HMH Rev. 8/25/04



Insert AM-4: The Club Membership Committee

The role of the club membership committee is to develop and implement an action plan for membership development. To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the size and strength of your club's membership base.

The responsibilities of the club membership committee summarized below are explained further in the Rotary publication, Lead Your Club: Membership Committee (2016-19 Edition), 226B-EN (616), downloadable at www.Rotary.org. The boxed material is taken from Club Membership section of The Planning Guide for Effective Rotary Clubs.

- Educate club members on how to attract new members and keep them involved
- Conduct classification surveys
- Look at your club's meetings, projects, and other activities and assess what it offers new members
- Develop a membership action plan to improve membership satisfaction
- Conduct club assessments to ensure that membership development and retention efforts succeed
- Sponsor newly organized clubs in your district, if you choose to
- Work with the public relations committee to create a positive club image that is attractive to prospective and current members alike.
- Develop programs to educate and train new and current club members.
- Sponsor newly organized clubs in your district, if applicable.

Some key issues and methods to be discussed by the committee include:

How does the club plan to achieve its membership goals? (check all that apply)

- ☐ Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- ☐ Ensure the membership committee is aware of effective recruitment techniques
- ☐ Develop a recruitment plan to have the club reflect the diversity of the community
- ☐ Explain the expectations of membership to potential Rotarians
- ☐ Implement an orientation program for new members
- ☐ Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- ☐ Assign an experienced Rotarian mentor to every new club member
- ☐ Recognize those Rotarians who sponsor new members
- ☐ Encourage members to join a Rotary Fellowship or Rotarian Action Group
- ☐ Participate in the RI membership development award programs
- ☐ Sponsor a new club
- ☐ Other (please describe):

Action steps:

Coming Attractions- Previewing RLI Part III

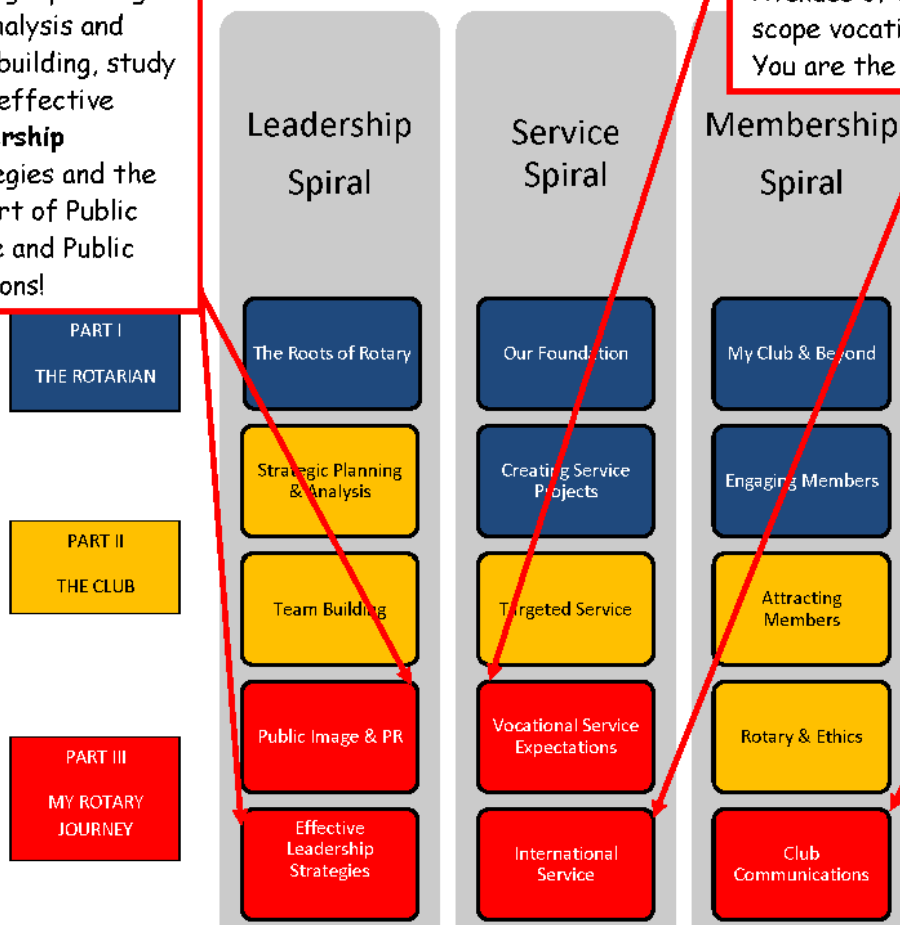
Part I centered on the basics of being a Rotarian. Part II builds on the Part I courses, and seeks to increase your effectiveness in your Rotary club! Part III opens the door to higher Rotary service and critical examination of more complex issues!

From the base of strategic planning and analysis and team building, study more effective **Leadership** strategies and the fine art of Public Image and Public Relations!

RLI CURRICULUM SPIRALS

Unleash your **Service** potential in all Avenues of Service, expand your scope vocationally & internationally. You are the "difference-maker"!

How do you energize and focus your **Members** and community? Communication is the key to getting our message out and swelling our ranks! You have a key role in developing & promoting the message of service.



*** Sign Up for RLI Part III Now! ***