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

2022-2023 Participant Materials

PART II

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.

2022-2023 Leadership (all-volunteer)

Mid-Atlantic RLI Board of Directors. Marcia Scheideman (Chair), Dr. Sean McAlister (Vice-Chair), Chris Stevenson (Secretary), Barbara Dresser (Treasurer), Lorraine Angelino (Immediate Past Chair; Finance Committee Chair) Judith Cocherell, Public Image Chair, The Reverend Patrick J. Rooney, Faculty Trainer, Roger Harrell, Sean Sawyer, Tarek Moneir, Ralph Menzel, PDG Bevin Wall (Chairman Emeritus), Past RI Vice-President Eric Adamson (Chairman Emeritus),

RLI Executive Staff. IT Chair: PDG Ken Dresser; Registrar Lin Kelly

Regional Coordinators. South Carolina Region (Districts 7750, 7770): PDG Rod Funderburk, North Carolina East Region (Districts 7710, 7720, 7730): Steve Hellersperk, North Carolina West Region (Districts 7670, 7680, 7690): Cristina Capello, Chesapeake Region (Districts 7600, 7610, 7620, 7630): PDG Roger Harrell, Mountain-Valley Region (Districts 7545, 7570): PDG Sean Sawyer

District Chairs (Appointed Annually by District Governor of each Member District), District 7545: Craig Stout, District 7570: Leslie Lynch, District 7600: SuAnne Bryant, District 7610; Ralph Menzel, District 7620: Pam Kreis, District 7630: Steven Grossman, District 7670: OPEN 7710: Elisabeth Weiner, District 7720: Stan Keller, District 7730: RB Richey, District 7750: Carol Burdette, District 7770:Tom Ledbetter.

 RLI Faculty & Staff. Many dedicated Rotary members make RLI work. View the RLI Page at www.midatlanticrli.org for additional information.

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.

<table>
<tr><td>

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?

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Materials

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

Insert RE-2: Guiding Principles of Rotary

Insert RE-3: Vocational Service Ideas

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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) <u>Ethical Issues Faced by Clubs</u>
   Rotary clubs and members are often faced with ethical situations which effect the entire club and can well spread into the community at large. These issues have a way of mushrooming to the extent that may impact the financial health of the club, membership, and overall reputation of the club and its members.

   The following issues will be addressed in small groups:
   a. Misuse of Club Funds
   b. Creating a Satellite Club
   c. Changing the Name of the Club

   Each small group will explore the following:
   i. Identify the Issues

"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*

   ii. Determine what considerations need to be addressed

iii. Develop an action plan

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. What ethical issues were raised in your small group discussions?

    b. Rotary Code of Conduct

        i. Discuss and determine how the Rotary Code of Conduct applies to the issues discussed in your small group.

        ii. Is the Rotary Code of Conduct 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?

<u>Insert RE-1</u>: 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 <u>The Rotary Global History Fellowship website</u>.

<u>Insert RE-2</u>: Guiding Principles of Rotary

The Object of Rotary

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:

<u>FIRST</u>. The development of acquaintance as an opportunity for service.

<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.

<u>THIRD</u>. The application of the ideal of service in each Rotarian's personal, business, and community life.

<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.

The Five Avenues of Service

Based on the Object of Rotary, Rotary's Philosophical cornerstone and foundation of a club's activities:

<u>Club Service</u> focuses on strengthening fellowship and ensuring the effective functioning of the club.

<u>Vocational Service</u> encourages Rotarians to serve others through their vocations and to practice high ethical standards.

<u>Community Service</u> covers the projects and activities the club undertakes to improve life in its community.

<u>International Service</u> encompasses actions taken to expand Rotary's humanitarian reach around the globe and to promote world understanding and peace.

<u>Youth Service</u> recognizes the positive change by youth & young adults via leadership and involvement.

The Four-Way Test

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.

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:

"Of the things we think, say or do:

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?"

Rotary Code of Conduct

As a Rotarian, I will

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

<u>Insert RE-3</u>: 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 workspace 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)

SCENARIO – 1: Misuse of Club Funds

A large, active Rotary club with sufficient resources to support all activities. Members often stepped up with their time and financial support to address community needs. An active, extensive succession plan was in place and worked well.

Treasurer had served for many years in the role and collaborated well with the Foundation Chair. He recently expressed resistance for upgrading processes to include electronic methods of payment.

For the first time in many years, your Rotary club decided to have an independent audit of the club finances. During this audit, it was discovered that there were missing funds for which no one could account.

SCENARIO – 2: Creating a Satellite Club

A small-town club made the plans to form a satellite club as it was determined that the 7am meeting time was excluding a whole group of potential members whose obligations prevented them from meeting at that time. The club explored forming a satellite club which would meet at another time, collaborate on projects, activities, fundraising efforts and financial structure

SCENARIO – 3: Changing Club Name

The primary objective for the Rotary club is MEMBERSHIP recruitment. Outreach focused on younger professionals as the club was beginning to age into a primarily retired male demographic. The club board and membership committee were focusing on improving the image for potential members doing an online search for clubs (primary way newcomers look for clubs to visit). A change in the name of the club was suggested as the name no longer described the club – where the club met; where members lived or worked. The name did describe an area of the city that had become rundown and devoid of business opportunities. For all those reasons the club leadership presented a plan to club membership for a name change.

Strategic Planning & Analysis

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

Session Goals	Materials
Analyze Your Rotary Club Review Possible Areas of Improvement Discuss How Specific Improvements Should be Made Understand the Process for Strategic Planning	<u>Insert SPA-1</u>: Good to Know for Strategic Planning & Analysis <u>Insert SPA-2</u>: Rotary Club Self-Evaluation of Performance & Operations <u>Insert SPA-3</u>: Strategic Planning Guide. *EN (109)* <u>Insert SPA-4</u>: Rotary's 5 Year Strategic Plan 2019 Look out: https://my.rotary.org/en/document/strategic-plan

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?

2) Review the Self-Evaluation Insert SPA-2: Rotary Club Self Evaluation and consider using it back in your home club as a

"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 Giay
— *Address to 1996 Rotary Convention, Calgary, Alberta, Canada*

basis for long range planning. It can be used 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?

c) How do we get there?

3) 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?

4) 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*

Strategic Planning Cycle

How can we improve? — Goals — Where do we want to go?

Results — Mission — Desired Outcomes

How did we do? — How do we get there?

Measures & Targets — Strategies

How do we measure success?

<u>Insert SPA-1</u>: 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. <u>BusinessDictionary.com</u>

- 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** years (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 <u>Rotarians</u> 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 <u>Rotarians</u> 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 <u>club leaders</u> 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), <u>Rotarians</u> 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 know _____

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 <u>average age</u> 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 _____

27. The club's new member orientation meetings are _____

28. The club's induction ceremony of a new member to the club is _____

29. The club's "mentoring" program is _____

30. The club has a specific retention program that is _____

31. The club's participation at district membership seminars is _____

32. The effort to encourage <u>all</u> members to attend the Rotary Leadership Institute is _____

33. Overall, the club's efforts to attract and keep new members is _____

Please add the total points for questions 1-33   Membership _____
Don't know _____

The Rotary Foundation

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

1. The club has an active Foundation chair that makes regular reports to the members. _____

2. The club sets and achieves its Foundation giving goal each year. _____

3. The club encourages individuals to become Paul Harris Fellows on their own. _____

4. The club matches contributions made by members to the RI Foundation. _____

5. The club makes a special presentation of a new Paul Harris Fellowship _____

6. The club publicly posts a list of all the Paul Harris Fellows. _____

Please rate the following:

7. **Most** (5 pts), **many** (4 pts) **some** (3 pts) **few** (2 pts) **none** (0 pts) of the club members understand that money given to The Rotary Foundation returns to the district for its use three years later _____

8. Information about The Rotary Foundation is provided to the club **every month** (5 pts), **every three months** (3 pts), **every six months** (1 pts) **never** (0 pts) _____

9. **All** (5 pts), **most** (4 pts), **many** (3 pts), **some** (2 pts), **few** (1 pt.), **none** (0 pts) of the club members know about Paul Harris Fellows and how to become one. _____

10. **All** (5 pts), **most** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of the club members

contribute each year to The Rotary Foundation under the Every Rotarian Every Year program. (EREY).   _____

11. My club has sponsored a VTT team member, a Peace Scholar or Water Scholar **within the last 1-3 yrs.** (5), **4-6 yrs.** (3), **longer or never** (0 pts), don't know (DK).   _____

12. My club has hosted a visiting VTT team member, or Peace or Water Scholar **within the last 1-5 yrs.** (5 pts), **6-8 yrs.** (3 pts), **longer or never** (0 pts), don't know (DK).   _____

13. My club has participated in a Global Grant with an international partner **within the last 1-3 yrs.** (5**), 4-6 yrs.** (3), **longer or never** (0 pts), don't know (DK).   _____

14. My club has applied for a District Grant **within the last 1 yr.** (5 pts), **2-3 yrs.** (3 pts), **longer or never** (0 pts), don't know (DK).   _____

15. My club has applied for a Global Grant **within the last 1 yr.** (5 pts), **2-4 yrs.** (3 pts**), longer or never** (0 pts), don't know (DK).   _____

16. **All** (5 pts), **most** (4 pts), **many** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Paul Harris Fellows ($1,000 cumulative gift)   _____

17. **All** (5 pts), **most** (4 pts), **many** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Paul Harris Sustaining Members ($100 gift per year commitment)   _____

18. **All** (5pts), **most** (4 pts), **many** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Bequest Society Members ($10,000 gift in Will/Insurance)   _____

19. **All** (5 pts), **most** (4 pts), **many** (3 pts), **few** (2 pts), **none** (0 pts) club members are Benefactors ($1,000 gift in Will/Insurance)   _____

20. **All** (5 pts), **most** (4 pts), **many** (3 pts), **few** (2 pts) **none** (0 pts) of club members are Paul Harris Society Members ($1,000 gift per year commitment)   _____

21. **Most** (5 pts), **many** (4 pts), **many** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Major Donors to The Rotary Foundation ($10,000 cumulative gift)   _____

22. **All** (5 pts), **most** (4 pts), **many** (3 pts), **few** (2 pts), **none** (0 pts) of club's existing Paul Harris Fellows make subsequent contributions to The Rotary Foundation   _____

Please add the total points for questions 1-22   Foundation_____
                                                            Don't know_____

Service Projects

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

1. The club's attempts to promote vocational service are   _____

2. The promotion of the 4-Way Test in the club and community are   _____

3. The use of career development programs by the club in local schools to help

students with career choices are   _____

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 know _____**

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 know _____

   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

	Your score	*DK's*
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)

	Your score	*DK's*
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 <u>do not</u> <u>make any adjustments to the total point final figure for the DK's. The following is for reference only.</u>

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.
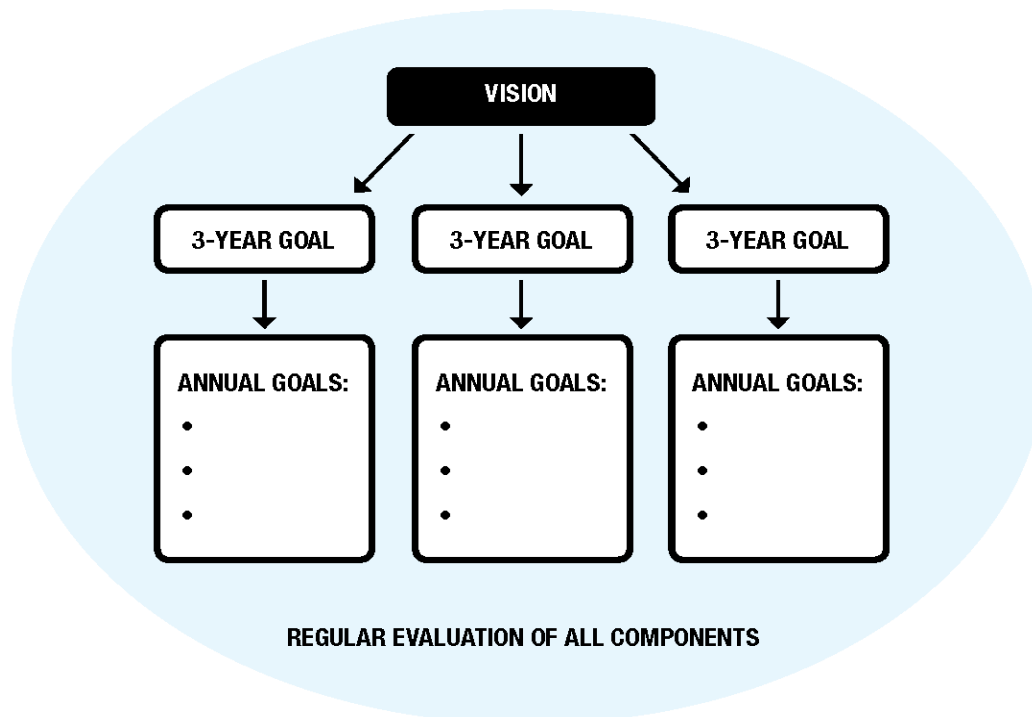
The Strategic Planning Model

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.

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

The Rotary Leadership Institute

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:

3. **How do we get there?** _____

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

Three-year goals:

_____

_____

_____

In order to achieve the three-year goals, the following annual goals must be achieved.

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

Three-year goal 1: _____

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

Three-year goal 2: _____

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

Three-year goal 3: _____

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

4. **How are we doing?**

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

<u>Insert SPA-4</u>: 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: <u>to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt</u>. 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.

ahead

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	*Materials*
Review the Rotary Foundation Funding Model	<u>Insert TS-1</u>: Good to Know for Targeted Service
Discuss the importance of the Rotary Foundation Funding Model to your club	<u>Insert TS-2</u>: SHARE Flowchart
	<u>Insert TS-3</u>: Targeted Service Case Studies
	<u>Insert TS-4</u>: Rotary Foundation Funding Model Flowchart
Discuss the Importance of the Six Areas of Focus and Sustainability	<u>Insert TS-5</u>: Areas of Focus Chart
	<u>Insert TS-6</u>: What is Sustainability?

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

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*

<u>Insert TS-1</u>: 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 <u>Rotary.org</u> 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 <u>Rotary.org</u>) 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
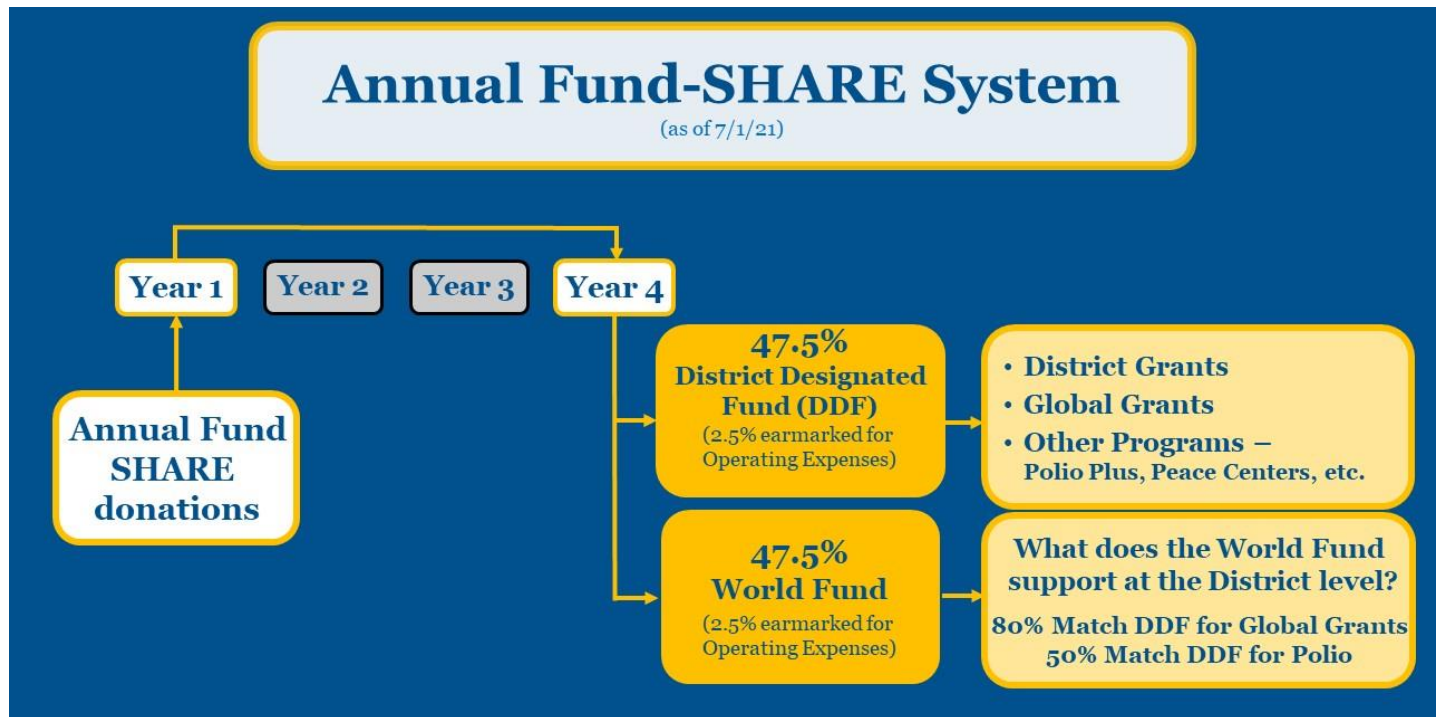
SHARE and District Designated Fund

How does the SHARE system work? Through the SHARE system, contributions to The Rotary Foundation are transformed into grants that fund local and international humanitarian projects, scholarships, and activities, such as vocational training teams (VTT). At the end of every Rotary year, contributions directed to the Annual Fund-SHARE from all Rotary clubs in the district are divided between the World Fund and the District Designated Fund (DDF), after 5% is deducted for operating expenses.

At the end of three years, your district can use the DDF to pay for Foundation, club and district projects that your club and others in the district choose. Districts may use up to half of their DDF to fund district grants. The remaining DDF may be used for global grants or donated to PolioPlus, the Rotary Peace Centers or another district.

World Fund

The World Fund provides the necessary funding for our highest priority activities around the globe. While 47.5% of SHARE-designated contributions are applied to the world Fund, you can also direct your entire gift to the fund. The Foundation uses the money to pay for grant and program opportunities available to all Rotary districts.

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 DISTRICT grant.

Are the sponsors including one of the seven areas of focus in their project?

NO

District grant activities do not need to include one of the areas of focus

You should apply for a **DISTRICT** Grant

YES

Global grants benefit communities through humanitarian projects in at least one of the seven areas of focus.

Is the total project budget at least $30,000?

NO

District grants have no minimum budget and administration is at the district level.

You should apply for a **DISTRICT** Grant.

YES

Global grant sponsors use a combination of DDF, cash and /or directed gifts or endowment earnings

Will sponsors partner with another qualified district or club?

NO

District grants may be used to fund local or international projects but do not need international partnerships.

You should apply for a **DISTRICT** Grant.

YES

Global grants are sponsored by one primary international and one primary host club or district. Both must be qualified.

You should apply for a **GLOBAL Grant.**

Ref:
TRF

Training Workbook

Insert TS-5: Areas of Focus Chart

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 health, the support of education and the alleviation of poverty.						
AREAS OF FOCUS	Peace and Conflict Resolution	Disease Prevention and Treatment	Water and Sanitation	Maternal and Child Health	Basic Education and Literacy	Economic and Community Development	Supporting the Environment*
STATEMENT OF PURPOSE	The Rotary Foundation promotes the practice of peace and conflict resolution	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:	The Rotary Foundation enables Rotary members to protect, preserve, and conserve the environment by:
GOALS	1. Strengthening local peace efforts.	1. Improving the capacity of local health care professionals.	1. Increasing equitable community access to safe drinking water and basic sanitation.	1. Reducing the mortality rate for children under the age of five.	1. Ensuring that children have access to quality basic education.	1. Strengthening the development of local entrepreneurs and community leaders, particularly women in impoverished communities.	1. Protecting and restoring land, coastal, marine and freshwater resources.
	2. The Rotary Foundation promotes the practice of peace and conflict.	2. Combating the spread of HIV/AIDS, malaria and other major diseases.	2. Strengthening the ability of communities to develop and maintain sustainable water and sanitation systems.	2. Reducing the maternal mortality rate.	2. Reducing gender disparity in education.	2. Developing opportunities for decent and productive work, particularly for youth.	2. Enhancing the capacity of communities and local governments to support natural resource management and conservation.
	3. Supporting Long-term peace-building in areas affected by conflict.	3. Enhancing the health infrastructure of local communities.	3. Educating communities about safe water, sanitation, and hygiene.	3. Improving access to essential medical services and trained health care providers for mothers and their children.	3. Increasing adult literacy.	3. Building the capacity of local organizations and community networks to support economic development.	3. Supporting agroecology and sustainable agriculture, fishing and aquaculture practices to improve ecological supporting solutions to reduce the emission of greenhouse gasses.
	4. Assisting vulnerable populations affected by conflict, mobilizing communities to help prevent the spread of major diseases.	4. Educating and mobilizing communities to help prevent the spread of major diseases.	4. Supporting studies related to water and sanitation.	4. Strengthening the capacity of communities to support maternal and child health.	4. Strengthening the capacity of communities to support basic education and literacy.	4. Supporting studies related to economic and community development.	4. Addressing causes of climate change and climate disruption and supporting solutions to reduce the emission of greenhouse gasses.
	5. Supporting studies related to peace and conflict resolution.	5. Supporting studies related to disease prevention and treatment.			5. Supporting studies related to basic education and literacy.		Goals 5–8 found in document "Rotary International Area of Focus Environment"

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	*Materials*
Explore How Committees and Team Building are used in Rotary Clubs	Insert TB-1: Good to Know for Team Building
Discuss the Advantages and Disadvantages of Committees	Insert TB-2: Urbana University of Illinois Exercise
Examine Committees as a Tool of Leadership	Insert TB-3: Exercise Follow-Up Club Committee Structures

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

2) Urbana University Exercise (Ins. TB-2)

> *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.*
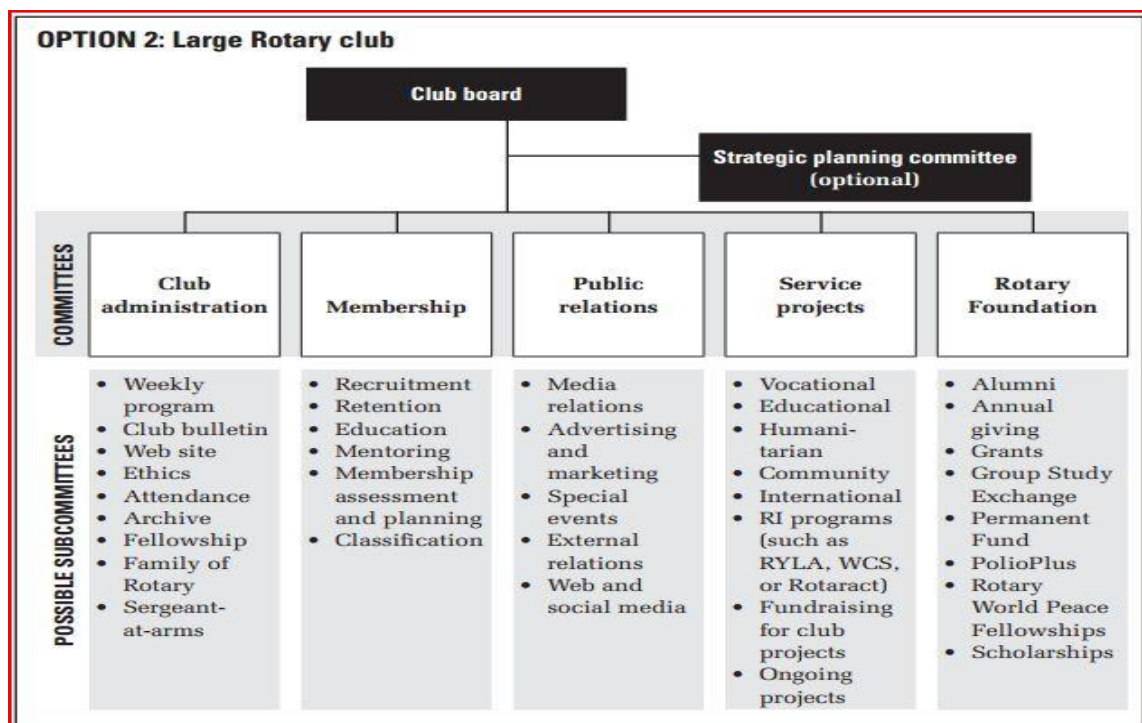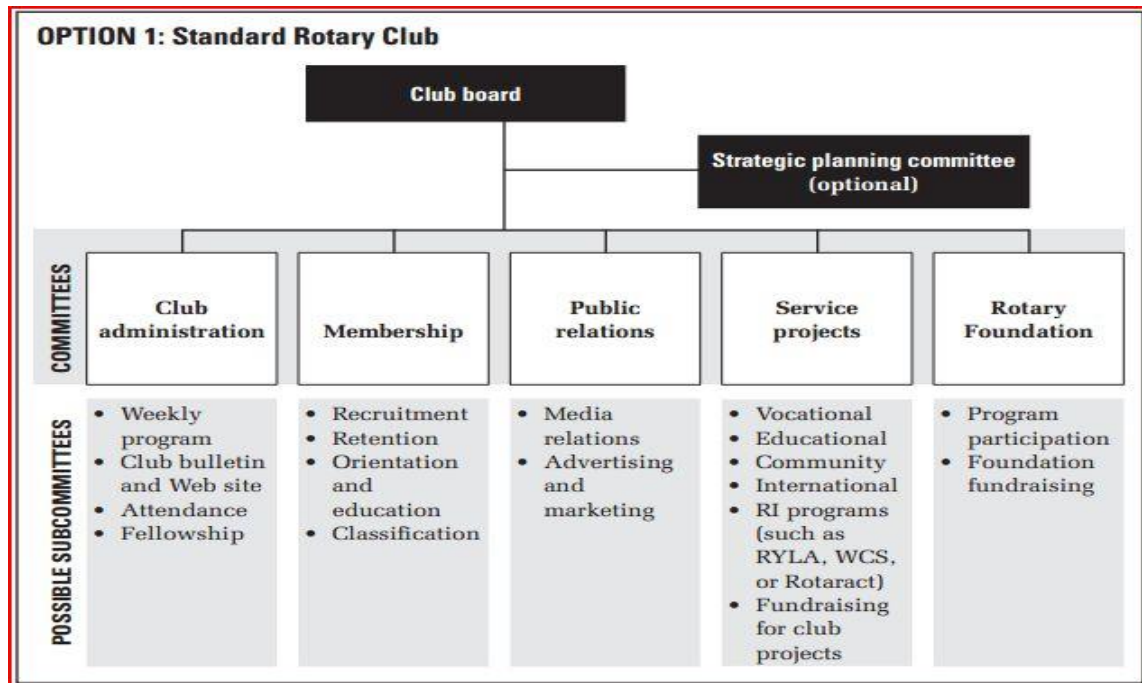>
> Paul P. Harris
> Founder of Rotary

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)

OPTION 1: Standard Rotary Club

Club board

Strategic planning committee (optional)

COMMITTEES

Club administration	Membership	Public relations	Service projects	Rotary Foundation

POSSIBLE SUBCOMMITTEES

Club administration	Membership	Public relations	Service projects	Rotary Foundation
• Weekly program • Club bulletin and Web site • Attendance • Fellowship	• Recruitment • Retention • Orientation and education • Classification	• Media relations • Advertising and marketing	• Vocational • Educational • Community • International • RI programs (such as RYLA, WCS, or Rotaract) • Fundraising for club projects	• Program participation • Foundation fundraising

OPTION 2: Large Rotary club

Club board

Strategic planning committee (optional)

COMMITTEES

Club administration	Membership	Public relations	Service projects	Rotary Foundation

POSSIBLE SUBCOMMITTEES

Club administration	Membership	Public relations	Service projects	Rotary Foundation
• Weekly program • Club bulletin • Web site • Ethics • Attendance • Archive • Fellowship • Family of Rotary • Sergeant-at-arms	• Recruitment • Retention • Education • Mentoring • Membership assessment and planning • Classification	• Media relations • Advertising and marketing • Special events • External relations • Web and social media	• Vocational • Educational • Humanitarian • Community • International • RI programs (such as RYLA, WCS, or Rotaract) • Fundraising for club projects • Ongoing projects	• Alumni • Annual giving • Grants • Group Study Exchange • Permanent Fund • PolioPlus • Rotary World Peace Fellowships • Scholarships

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 teamwork, 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:

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 where 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-3: Exercise Follow-Up

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

- How were 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 were 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	**Materials**
Identify My Club's Target Audience and Profile	Insert AM-1: Good to Know for Attracting Members
	Insert AM-2: Membership Assessment Tool
Define the Attributes of the Target Audience	Insert AM-3: Getting Connected - Networking
	Insert AM-4: The Club Membership Committee
Explore How My Club Can Attract the Target Audience	

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 Topic

1) What makes a club ATTRACTIVE to potential members?

2) Since completing the AM-2: Club Profile Sheet, discuss what that might 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) What are the attributes of a growing thriving club?

   a. As a group, discuss the results of your answers to the preceding

> "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.

6) How can you "fix" a dying club?

7) Who should be invited to be a member of your Rotary club? Why?

8) What are some recent changes were made by Rotary International to address increasing membership?

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: Membership Assessment Tool

(801_membership_assessment_tools_en.pdf)

Is your club strong or are your struggling? Either way, take some time to evaluate what you're doing. Using assessment tools will reveal opportunities to add value to your club experience so that more people will join and fewer members will leave. Here are some possibilities available in Rotary:

- Representing Your Community's Professions (classification assessment)
- Diversifying Your Club (member diversity assessment)
- Finding New Club Members (prospective member exercise)
- Improving Your Member Retention (retention assessment and analysis)
- Enhancing the Club Experience (member satisfaction survey)
- Understanding Why Members Leave (exit survey)

In the Membership Assessment Tool referenced above, steps are outlined for taking a successful classification assessment. Here's how to get started.

Step 1: Gather Member Data
Have all members complete the Occupation and Professional Expertise Survey on page 1.4 of the assessment tool.

Step 2: Evaluate the Data
Analyze the completed Occupation and Professional Expertise Surveys and fill in the Classification Audit on page 1.6 of the tool

Step 3: Collect Data on Your Community
Gather data about the professional makeup of your community. Fill in the Classification Audit table with the top five professions in your community.

Step 4: Analyze the Data
Use the results of the Classification Audit to determine which professions should be added to your club for balance.

Step 5: Present the Results
Share the results and recommended actions at your club meeting.

Step 6: Take Action
Identify qualified prospective members according to the gaps you found in your club's classifications.

Refer to the Membership Assessment Tool document for detailed information and tools for your use.

Insert AM-3: Get Connected - Networking

Insert AM-4: The Club Membership Committee

The <u>role</u> 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 <u>responsibilities</u> of the club membership committee summarized below are explained further in the Rotary publication, <u>Lead Your Club: Membership Committee (2016-19 Edition)</u>, 226B-EN (616), downloadable at <u>www.Rotary.org</u> . 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.

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:


The Rotary Leadership Institute

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!

RLI CURRICULUM SPIRALS

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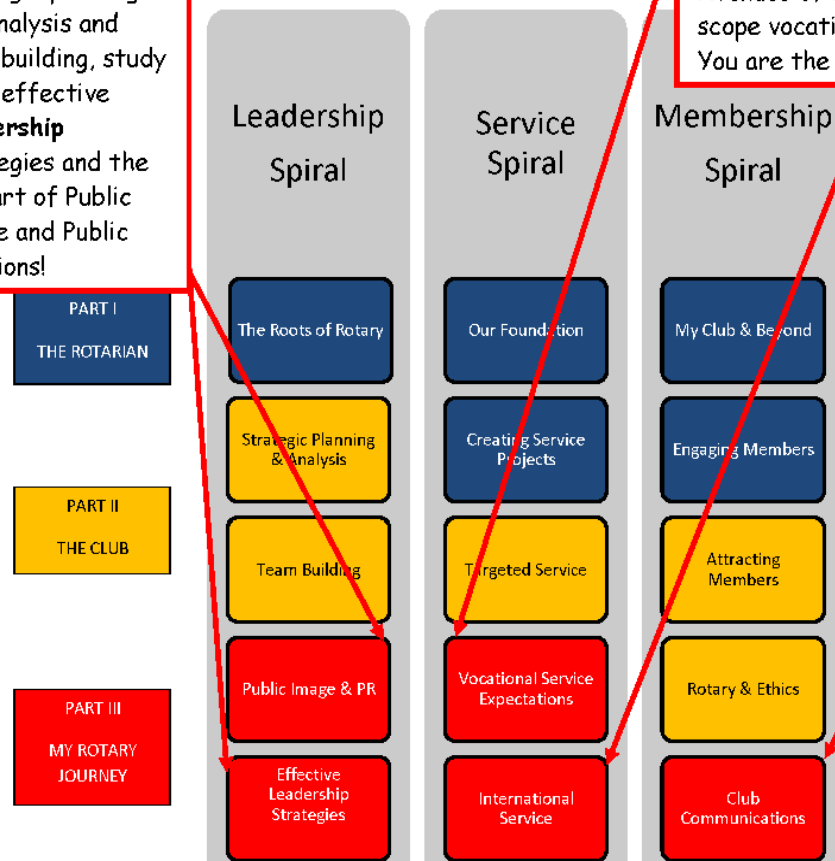
Unleash your **Service** potential in all Avenues of Service, expand your scope vocationally & internationally. You are the "difference-maker"!

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.

PART I THE ROTARIAN	Leadership Spiral	Service Spiral	Membership Spiral
	The Roots of Rotary	Our Foundation	My Club & Beyond
PART II THE CLUB	Strategic Planning & Analysis	Creating Service Projects	Engaging Members
	Team Building	Targeted Service	Attracting Members
PART III MY ROTARY JOURNEY	Public Image & PR	Vocational Service Expectations	Rotary & Ethics
	Effective Leadership Strategies	International Service	Club Communications

Sign up for RLI Part 3 at midatlanticrli.org