

# RLEI

20<sup>th</sup>  
ANNIVERSARY

A Joint Project of over 300 Rotary Districts worldwide



*2012-13 Rotary Year  
Twentieth Anniversary Edition*

**PART I**



# RLI Part I – THE ROTARIAN

## TABLE OF CONTENTS

**The Rotary Leadership Institute (RLI)** is a grassroots, multi-district leadership and Rotary development program using facilitation in small groups to engage Rotarians and strengthen clubs.

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

Our Mission: The Rotary Leadership Institute is a grassroots, multi-district leadership development program whose mission is to strengthen Rotary clubs through quality leadership education.

### COURSE MATERIALS

Event Agenda, Faculty, Upcoming RLI Events, Division Leadership, and Welcome Letter are included as a supplement to the course materials or online. Outlines and materials are online at [rlifiles.com](http://rlifiles.com).

	<p><b>Insights Into Leadership</b> <span style="float: right;">1</span></p> <p>As a Rotarian, I am, by definition, a leader. Join us as we explore the characteristics of leadership, motivational techniques, and leadership styles. How do I best lead?</p>
	<p><b>My Rotary World</b> <span style="float: right;">3</span></p> <p>As a Rotarian, I am part of a worldwide organization of like-minded people. Take some time to truly understand the purpose and structure of Rotary. Can these resources help me?</p>
	<p><b>Engaging Members</b> <span style="float: right;">11</span></p> <p>I make my club and Rotary stronger by my active participation. Engaged club members have fun, make friends, and effectively serve. This is why I joined Rotary!</p>
	<p><b>Our Foundation</b> <span style="float: right;">19</span></p> <p>I am "doing good" in my local community and around the world. Learn about the basic goals and programs of our Foundation. I am a force for good in the world!</p>
	<p><b>Ethics – Vocational Service</b> <span style="float: right;">25</span></p> <p>I am ethical, recognize and promote ethics in others, and seek opportunities to serve through my vocation. You can see that I am a Rotarian.</p>
	<p><b>Service Projects</b> <span style="float: right;">29</span></p> <p>I am a vital part of a worldwide service organization of business, professional and community leaders meeting needs in communities. I can build, run and promote service.</p>
	<p>Coming Attractions <span style="float: right;">Last Page</span></p> <p>Course Evaluation <span style="float: right;">Handout</span></p>

**About Your RLI Program.** The Rotary Leadership Institute is a grassroots, multi-district leadership development program whose mission is to strengthen Rotary clubs through quality leadership education. Established in 1992, RLI has become a worldwide organization with divisions in every continent of the world. While it is an unofficial program of Rotary International, it has substantial support of a number of past Rotary International Presidents and current, past and incoming R.I. Directors. The R.I. Board has adopted a resolution recommending RLI or similar programs to the districts and the Council on Legislation has twice recommended RLI to the Board. For more information on RLI, see our website at [www.rotaryleadershipinstitute.org](http://www.rotaryleadershipinstitute.org).

**The RLI Recommended Curriculum.** RLI recommends a curriculum and provides outlines and faculty materials to all its divisions. The curriculum has been continually revised and upgraded over the years. Because of the growth of RLI, it is expected that major revisions will be recommended every three years in order to give divisions a sufficient opportunity to orient their faculty members and to provide translations where necessary. Important changes in Rotary are provided annually to all divisions. All curriculum materials and available translations are posted on the RLI materials website at [rlifiles.com](http://rlifiles.com).

**The RLI Curriculum Committee.** The committee meets annually most years and all divisions are requested to provide suggestions for improvement based on their own experiences. Any division may send representatives to the Annual Curriculum Meeting.

2012-2013 RLI Curriculum Committee

*Chair: Gary Israel, RLI, Sunshine Division*

*Editor: Bevin Wall, Zone 33 RLI*

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# Insights Into Leadership

As a Rotarian, I am, by definition, a leader.



## Session Goals

Explore the Characteristics of Leadership

Discuss what Motivates People in a Volunteer or Civic Organization

Examine Your Own Leadership Style

## Inserts & Online Materials

  Volunteer vs. Professional Overheads

  The Basics for Effective Leadership Are Really Pretty Basic

  12 Leadership Essentials for the 21st Century

Key:  attached insert  online  article  ppt

This is a course in the Leadership Spiral going across the three days of RLI. Additional courses building on this session are Strategic Planning & Analysis, Team Building, Club Communications, Public Image & Public Relations and Effective Leadership Strategies. Service and Membership have separate spirals.

## Session Topics

- 1) What is the difference between leadership in a business and leadership in Rotary? What is the role of a “leader” in Rotary?
- 2) List the characteristics of good leaders. Discuss which characteristics you think are important.
- 3) While leadership styles may differ by culture and generation, analyze the particular leaders discussed above in terms of the following leadership style categories\* (\*based on research by Kurt Lewin and Rensis Likert):
  - Participative: seeks to involve other people;
  - Situational: changes leadership style according to situational factors;

*“Be sure you apply the qualities...that made your own business successful...as diligently in the business of Rotary — the multinational enterprise in which we are all partners. We must work tirelessly to perfect our important product, service, and look always toward our ultimate bottom line: international understanding and peace.”*

*1988-89 RI Pres. Royce Abbey  
— Running Rotary Like a Business,  
THE ROTARIAN, October 1988*



## The Rotary Leadership Institute

- Transactional: works through hierarchical structures and systems of reward and punishment;
- Transformational: leads through inspiration, sharing energy and enthusiasm;
- Servant: serves others rather than being served.

*“Rotary must be renewed constantly at the club level to avoid stagnation and at the international level to avoid retrogression. But Rotary at all levels depends on the individual Rotarian.”*

1969-70 James F. Conway  
— *The Challenge: Review & Renew*  
THE ROTARIAN, July 1969

- 4) Are good leaders born or can leadership be taught?
- 5) What motivates someone to excel in the workplace?
- 6) What motivates someone in a Rotary club?

- 7) Think about presidents of your club and select who you think was the best leader (without naming names). Tell the group why that leader was the best. What seem to be the most significant differences between strong and weak Rotary club leaders?



- 8) Why are both leaders and followers important in an organization and in your Rotary club? Could you be both?
- 9) Why is “vision” an important quality for a Rotary leader?

Summary: Good leadership requires thought, planning, preparation, a willingness to try something new, not being bound by the past, and the confidence to take risks.



# My Rotary World

As a Rotarian, I am part of a worldwide organization of like-minded people.

## Session Goals

- Discuss the Purpose of Rotary
- Understand the Layers of Our Organization
- How Can People at each Level Help your Club

## Materials

- Insert MRW-1: My Rotary Organizational Chart
- Insert MRW-2: RI Strategic Plan
- Insert MRW-3: RI Strategic Plan Priorities
- Insert MRW-4: Rotary's Core Values
- Insert MRW-5: The Object of Rotary
- Rotary Basics. 595-EN-(510)
- History of Rotary International
- Contact RI Staff

Key: attached insert online article ppt

This is a course in the Rotary Membership Spiral going across the three days of RLI. Other courses in this session are Engaging Members, and Ethics & Vocational Service. Additional courses building on this session are Attracting Members, Rotarians, Vocational Service & Expectations. Service and Leadership have separate spirals.

## Session Topics

- 1) Important Rotary Guiding Concepts
  - a) Has anyone ever asked you what Rotary is all about? What do you tell them?
  - b) Where should we look for the purpose of Rotary?
  - c) What is "The Object of Rotary"?

*"Rotary must be renewed constantly at the club level to avoid stagnation and at the international level to avoid retrogression. But Rotary at all levels depends on the individual Rotarian."*

1969-70 James F. Conway  
— *The Challenge: Review & Renew*  
THE ROTARIAN, July 1969



d) What are the “Five Avenues of Service”?

2) Rotary International (R.I.)

a) Why is R.I. necessary? Why can't we just have clubs and not worry about these other entities? Wouldn't it be cheaper if we didn't have to pay dues to R.I. and the district?

b) Are there any advantages in being an international organization?

c) How does R.I. control/rule the clubs? Is my club autonomous? What is my club required to do? Is there a strategic plan for Rotary? Does Rotary's strategic plan apply to my club?

d) How is R.I. organized? What is its leadership structure? How is it administered? How are policies determined? Do clubs have any input or leverage in policy?

e) How do we contact R.I.? Where can we get information and help?

- The Rotary International Web Site [www.rotary.org](http://www.rotary.org)
- The Rotary Foundation Contact Center- Telephone Number: 866-9RO-TARY or 866-976-8279 (U.S. and Canada only)
- Zone Websites
- RLI - Rotary Leadership Institute Web Sites, including RLI International (Umbrella Organization) at [www.rotaryleadershipinstitute.org](http://www.rotaryleadershipinstitute.org), and RLI Division sites listed at that site or provided by your facilitator.
- District web sites - links on both Zone web site and R.I. web site, use format [www.rotaryxxxx.org](http://www.rotaryxxxx.org) where the xxxx is the 4 digit District Number, i.e., 7690, etc.

*“Rotary is so simple that many people do not understand it, and some even misunderstand it. Rotary is not a philosophy...not an all-embracing world point of view which answers every question...and satisfies all the dictates of the heart and mind. Rotary is merely an association of business and professional men united in the ideal of service.”*

1937-38 RI Pres. Maurice Duperrey  
— Address to 1938 Rotary  
Convention  
San Francisco, California, USA



3) The Rotary District

- a) Why do we have districts?
- b) What does a district governor do? What does an assistant governor do?
- c) Why is the district important to the club?
- d) How does a club contact the district? How do I find out about my district?

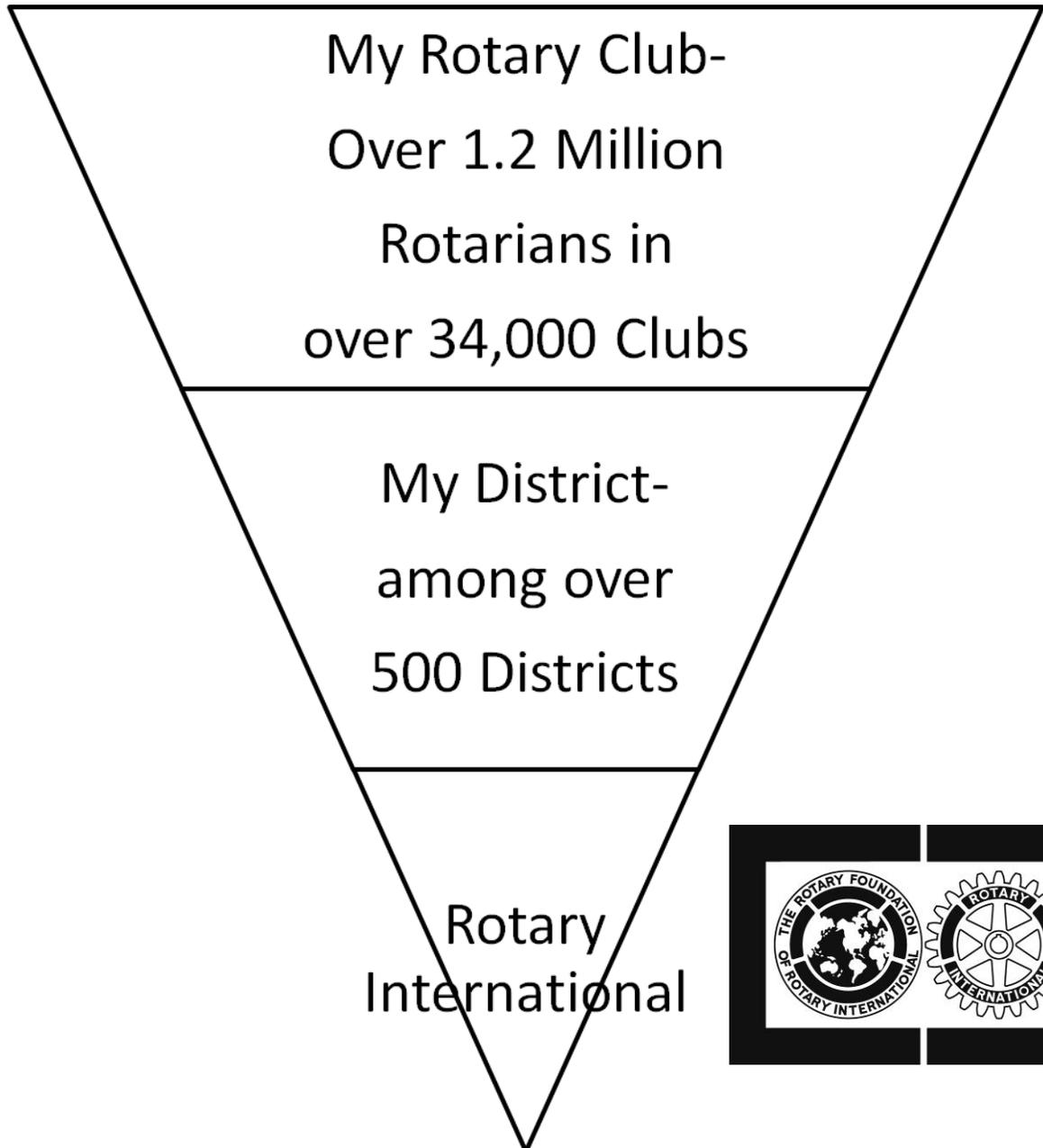
4) The Rotary Zone

- a) What is a Zone and why do we have them?
- b) What is a RI Director's role within the Zone? What are the roles of the Rotary Coordinator, the Regional Rotary Foundation Coordinator, and the Public Image Coordinator?
- c) Is the Zone important to the club? Why or why not?



Insert MRW-1:

**My Rotary World Organizational Chart**





## Insert MRW-2: Rotary International Strategic Plan





## **Insert MRW-3: Rotary International Strategic Plan Priorities and Goals**

The RI Strategic Plan identifies 3 strategic priorities supported by 16 goals:

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### **Support and Strengthen Clubs**

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new, dynamic clubs
- Encourage strategic planning at club and district levels

### **Focus and Increase Humanitarian Service**

- Eradicate polio
- Increase sustainable service focused on:
  - New Generations Service programs
  - The Rotary Foundation's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

### **Enhance Public Image and Awareness**

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities



## Insert MRW-4: Rotary's Core Values

### CORE VALUES



#### **Core Values**

Rotary's core values represent the guiding principles of the organization's culture, including what guides members' priorities and actions within the organization. Values are an increasingly important component in strategic planning because they drive the intent and direction of the organization's leadership.

#### **Service**

We believe that our service activities and programs bring about greater world understanding and peace. Service is a major element of our mission. Through the plans and actions of individual clubs, we create a culture of service throughout our organization that provides unparalleled satisfaction for those who serve.

#### **Fellowship**

We believe that individual efforts focus on individual needs, but combined efforts serve humanity. The power of combined efforts knows no limitation, multiplies resources, and broadens our lives and perspectives. Fellowship leads to tolerance and transcends racial, national, and other boundaries.

#### **Diversity**

We believe Rotary unifies all people internationally behind the ideal of service. We encourage diversity of vocations within our membership and in our activities and service work. A club that reflects its business and professional community is a club with a key to its future.

#### **Integrity**

We are committed to and expect accountability from our leaders and fellow members, both in the results of our efforts and in the processes we use to accomplish our goals. We adhere to high ethical and professional standards in our work and personal relationships. We are fair and respectful in our interactions, and we conscientiously steward the resources entrusted to us.

#### **Leadership**

We are a global fellowship of individuals who are leaders in their fields of endeavor. We believe in the importance of leadership development and in leadership as a quality of our members. As Rotarians, we are leaders in implementing our core values.

All of these core values are reflected in the Object of Rotary and The Four-Way Test, which we use in our daily lives. They inspire us to foster and support the ideal of service for developing and maintaining high ethical standards in human relations.



## Insert MRW-5: The Object of Rotary

**R O T A R Y**



# 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:*

- I. *The development of acquaintance as an opportunity for service;*
- II. *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;*
- III. *The application of the ideal of service in each Rotarian's personal, business, and community life;*
- IV. *The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.*

**I N T E R N A T I O N A L**

RUSSELL-HAMPTON CO.



# Engaging Members

I make my club and Rotary stronger by my active participation

## Session Goals

Identify the Value of Engaging Our Members

Discuss Ways that I can be Involved in Club Activities

Explore Options for Engagement

## Materials

-  Insert EM-1: Membership Satisfaction Survey (RI)
-  Insert EM-2: Prior Generation vs. New Generation
-  Insert EM-3: Engagement Ideas: Delivering Value - Keeping Rotarians
-  Insert EM-4: 12 Point Plan for Member Engagement
-   Membership Development Resource Guide. 417-EN (408)
-   Club Assessment Tools EN (808)
-   No Success Without Succession, Michael McQueen 2010
-   Membership Development Page at [www.rotary.org/en/Members/RunningAClub/MembershipDevelopment](http://www.rotary.org/en/Members/RunningAClub/MembershipDevelopment)

Key:  attached insert  online  article  ppt

This is a course in the Rotary Membership Spiral going across the three days of RLI. Other courses in this session include My Rotary, and Ethics & Vocational Service. Additional courses building on this session are Attracting Members, and Rotarians, Vocational Service & Expectations. Service and Leadership have separate spirals.

## Session Topics

- 1) Why are you in your Rotary club?
- 2) What keeps you in your Rotary club?
- 3) Why is it important to engage our members?
- 4) What strategies can your club use to engage its members?

*“Rotary club membership must offer opportunities for meaningful service and friendships for all Rotarians. At the same time, we must maintain high standards. If we begin to simply look for dues-paying members as a means of increasing our budget, it will severely damage our credibility and signal the end of our organization.”*

*1999-00 RI Pres. Carlo Ravizza*



## Insert EM-1: Membership Satisfaction Survey (4 pages)

This survey is intended for use by the club. All club members should complete it to help assess member satisfaction with club activities and projects. Please return your completed form as directed by the club secretary. All responses are confidential.

Do you feel welcome in our Rotary club?  Yes  No

If no, why not? (check all that apply)

Compared to me, other members are (check all that apply):

Older  Younger  Different gender  Different ethnicity  Other \_\_\_\_\_

Club members haven't made an effort to interact with me.

Other \_\_\_\_\_

Do you feel comfortable sharing concerns with club leaders?  Yes  No

If no, why not? (check all that apply)

Club leaders have so many responsibilities; I don't want to burden them.

Club leaders have their own agenda and aren't interested in other ideas.

I haven't been a member long enough to feel comfortable approaching club leaders.

I don't want to be perceived as a complainer.

Other \_\_\_\_\_

How would you rate the level of our club's involvement in the following types of activities?

	Excellent	Adequate	Insufficient	Not Aware
Membership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you participated in club projects and activities?  Yes  No

If yes, how did you become involved?  I volunteered  I was asked

If no, why not? \_\_\_\_\_



Please indicate your involvement in the following types of activities:

	Currently Involved	Would Like to Be Involved
Membership development	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>

How would you rate your level of satisfaction with your participation in club activities and projects?

- Very satisfied     Satisfied     Dissatisfied

If dissatisfied, why? (check all that apply)

- |  |   |
|--|---|
| <input type="checkbox"/> Insufficient knowledge  | <input type="checkbox"/> Lack of quality service projects   |
| <input type="checkbox"/> Personality conflicts   | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost                    | <input type="checkbox"/> Insufficient family involvement    |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other _____                        |

How would you rate the following costs associated with membership in our club?

	Excessive	Reasonable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>
Weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>
Club fines/assessments	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to service projects	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>



How would you rate the following aspects of our weekly meetings?

	Excellent	Adequate	Insufficient
Amount of Rotary content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Convenient	Inconvenient	
Location	<input type="checkbox"/>	<input type="checkbox"/>	Suggested location: _____
Meeting time	<input type="checkbox"/>	<input type="checkbox"/>	Suggested time: _____

Which aspects of our meeting place do you find unsatisfactory? (check all that apply)

- Service
- Décor/atmosphere
- Meal quality
- Meal cost
- Parking availability
- Other \_\_\_\_\_

Which of the following changes would improve our club meetings? (check all that apply)

- Better speakers
- Increased variety of program topics
- More involvement of family
- More service opportunities
- More focus on fellowship
- Increased emphasis on vocational information
- Better time management
- More leadership opportunities

How would you rate the amount of our club's fellowship activities?

- Too many
- Right amount
- Too few

How would you rate the amount of Rotary information provided through our club Web site/newsletter?

- Excessive
- Adequate
- Insufficient



**Which of the following words would you use to describe our club Web site/newsletter?**

*(check all that apply)*

- Interesting
- Useful
- Informative
- Boring
- Limited
- Uninformative

**Is there anything else you'd like to see changed?**

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**What response does your spouse/partner/family have to your involvement in Rotary?**

*(check all that apply)*

- Feels proud of my involvement
- Thinks Rotary takes too much of my time
- Wants to know more/be involved
- Thinks Rotary is too expensive
- Wants to meet/interact with other Rotary spouses/partners/families
- Would be interested in becoming a member
- Other \_\_\_\_\_



## Insert EM-2: Prior Generation vs. New Generation



### **Prior Generations' Reasons for Joining Rotary**

- Social Considerations
- Stature in the Community
- Business Networking
- Entertainment
- Connections with Our Community



Rotary Leadership Institute – Part I

Rev.2007-07-08 bww17



### **Current Generations' Reasons for Joining Rotary**

- The Desire to Do Something Important outside the Workplace
- The Desire to Work within a Group of Peers
- The Opportunity to Develop Leadership Skills



Rotary Leadership Institute – Part I

Rev.2007-07-08 bww17



# Insert EM-3: Engagement Ideas: Delivering Value- Keeping Rotarians!

**The Issue.** While overall membership has remained stagnant, Rotary Clubs have gained and lost approximately 1.2 million members worldwide in the past 7 years- a staggering retention failure. Rotarians who leave for involuntary purposes (death, relocation, etc.) make up only 7% of the retention loss annually. Statistics from select regions in the Eastern US, Caribbean and South America show that the members who voluntarily leave are usually those who have been in Rotary less than 3 years (“Newer Members”). Newer Members indicate they stay in Rotary to: (1) serve their community, (2) network, and (3) represent their vocation and develop leadership skills.

**The Fix.** 10 easy-to-do ideas for your club targeted to address these issues and to meet the expectations of Newer Members.

 <p><b>Pair Bonding.</b> Place newer members on a Newer Member Classification Committee tasked to review all club classifications and to pair newer members with more experienced members. Pairings are to be announced in club meeting. Pairs will sit together during designated meetings, at least monthly. Monthly discussion topics will be encouraged from the podium, such as club history, past club projects, vocational sharing, favorite make-up meetings, and ideas for new community service projects.</p>	 <p><b>A Minute in the Life.</b> Newer members are scheduled for one-per-week, one minute club meeting podium summary of a job or career related service or product they offer, idea or opportunity in a one page, written format. Talks are not to go “off-script”, no “ad libbing”. Collect and post summary in weekly club program or on club website, with a link or reference to their business.</p>
 <p><b>Web-Connected.</b> The name of every Rotarian in the club should be posted to the club website, with their business name linked to their individual or company website (voluntary and with permission). Rotarians should mention their Rotary affiliation on their individual or company website and link back to their club website.</p>	 <p><b>RLI Posse.</b> Newer members should be financed by the club and sent in small groups to a convenient Rotary Leadership Institute near them, commuting together. The group should report back, as a group, at a club meeting, and should make and advocate for 3 proposals for innovation and /or new projects to the club and /or board. See <a href="http://www.rotaryleadershipinstitute.org">www.rotaryleadershipinstitute.org</a>.</p>
 <p><b>Party Time.</b> Organize clubs to meet once a month at a non-Rotary place and time for a “meet and greet” social and networking session. Clubs may sponsor the costs or it may be arranged “pay as you go” for Rotarians, with a very low cost. Mingling may be encouraged by use of varied passports, stations, “secret Rotarian” or other mixing strategies, if needed.</p>	 <p><b>Adopt-a-Class.</b> Newer members partner with a local elementary or middle school teacher and class to perform a “hands-on”, low or no cost service project at or near their school. First step is a needs assessment with school administration or personnel. The whole club can be invited, but the newer members lead.</p>
 <p><b>“Flash Mob” Project.</b> Charge newer member committee with organizing and conducting a single or multi-club “hands-on” community service project, maximum duration 2 hours. Document with video or photos. Present report at regular club meeting.</p>	 <p><b>Career-Share.</b> Charge newer member committee with organizing and conducting a single or multi-club “Career Fair”, “Career Day”, or “job shadowing” event for local Middle School, High School, or College.</p>
 <p><b>How Do You Interact?</b> Start an Interact club at a school with the younger age now allowed (12 and up), in Middle School. Newer members lead the effort, work with the school sponsor, attend meetings, and serve as Rotarian sponsor for the club.</p>	 <p><b>Fun Committee.</b> It’s exactly what it sounds like! Staff with (mostly) newer members.</p>

Insert by PDG Bevin Wall, Zone 33 Rotary Coordinator 2010-2013. [rcBevin@gmail.com](mailto:rcBevin@gmail.com)



**Insert EM-4:**

**Twelve Point Plan for Member Engagement**

- 1) Set up a Member Services Committee
- 2) Measure & Examine Club's History of Engagement and Member Retention Rate
- 3) Provide Pre-Induction Orientation Program
- 4) Greet – Assign a Job – Introduce –
- 5) Develop a Mentor & Education Program
- 6) Conduct a Reception for New Members
- 7) Log New Member Activities the first year
- 8) After Year One- Recognize & Interview
- 9) Advocate New Member Opportunities
- 10) Provide Networking & Professional Development Opportunities
- 11) Spot Danger Signs for Retention & Remedy
- 12) Be Innovative – Highlight the Reasons We Stay



# Our Foundation

I am "doing good" in my local community and around the world

## Session Goals

Review the Basic Goals, Programs & Financing of our Rotary Foundation

Discuss the Importance & Value of our Rotary Foundation to Clubs and to Rotary International

## Materials

Insert\_OF-1: What is Future Vision?

Foundation Facts 159-EN (1111)

Quick Reference Guide 219-EN (511)

Rotary Basics: The Rotary Foundation  
<http://www.rotary.org/en/Members/NewMembers/RotaryBasics/Pages/TheRotaryFoundation.aspx>

Key: attached insert online article ppt

This is a course in the Service Spiral going across the three days of RLI. Additional courses building on this session are Service Projects, Targeted Service, International Service, Rotary Opportunities, and Making a Difference. Leadership and Membership have separate spirals.

While this course and others within RLI discuss Rotary Foundation topics, you should consult your district for specific Rotary Foundation training.

## Session Topics

- 1) What is a foundation? What are some examples of foundations? What are some of the advantages of a foundation?
- 2) What do you know about The Rotary Foundation? What does it do? Why do we need it?
- 3) Who runs The Rotary Foundation?
- 4) What is the difference between Rotary International and The Rotary Foundation?
- 5) How can you and your club contribute to and raise funds for The Rotary Foundation? What incentives do our Foundation offer to enhance giving?

*... it seems eminently proper that we should accept endowments for the purpose of doing good in the world, in charitable, educational or other avenues of community progress...*

1916-17 RI Pres. Arch Klumph  
RI Convention, Atlanta GA  
June 18, 1917



- 6) When you give money to The Rotary Foundation, can you designate where the funds go and for what purpose? What are the options and how do they work?
  
- 7) What is meant by “EREY”?
  
- 8) How can participating in our Foundation benefit my club?
  
- 9) Where can I get more information?
  - a) The Rotary Foundation page at [www.Rotary.org](http://www.Rotary.org).
  - b) The Contact Center at 866-9RO-TARY or 866-976-8279 (US & Canada only). Email [contact.center@rotary.org](mailto:contact.center@rotary.org). Foundation Specialists answer calls Monday through Friday from 9:00am to 6:00pm, EST
  - c) Your club, district or zone Rotary Foundation specialists.
  
- 10) Share your Rotary moment.



## Insert OF-1: What is Future Vision?

### **What is Future Vision?**

The Future Vision Plan is The Rotary Foundation's new grant model to support district and club humanitarian and educational projects. Under Future Vision, the Foundation offers only two types of grants: district grants and global grants. District grants are block grants that allow clubs and districts to address immediate needs in their communities and abroad. Global grants fund large international humanitarian projects, vocational training teams, and scholarships that have sustainable, measurable outcomes in one or more of the areas of focus.

### **How will the new grant model benefit clubs and districts?**

The Rotary Foundation's new grant model offers clubs and districts the opportunity to carry out projects and activities that create greater impact, build stronger clubs, increase membership and donor base, enhance public image, and generate enthusiasm to support local service efforts.

In addition, clubs and districts will benefit from the following features:

- Grants have been reduced from twelve types to two— global grants and district grants —while maintaining a variety of activities within the grant types.
- Grant payments are processed more quickly and the application and approval process is transparent, allowing clubs and districts to see the status of their grants throughout.
- Districts can now access 50 percent of their District Designated Funds for district grants, which gives them more funding for projects and more control over their DDF.
- District grants can be used to sponsor a wide range of activities locally and abroad, including traditional Group Study Exchange teams, scholarships, and any projects that align with the Foundation's mission.
- Monitoring and evaluation of grants will provide important information to grant sponsors and to the Foundation. For example, knowing the number of people who benefit from their projects can help clubs and districts promote the value of their work to the general public.
- Clubs and districts can determine their level of involvement in global grants. They can develop their own project with an international partner or they can apply for packaged global grants, which are pre-structured with strategic partners and supported entirely by the World Fund.
- The timeline for global grant scholar selection is shorter, so clubs and districts do not have to plan as far ahead.
- Global grant scholarships receive a World Fund match, thereby lowering the annual cost of a scholarship for the sponsors.
- Vocational training teams, which travel to meet vital humanitarian needs, offer service opportunities far beyond the GSE experience. For example, during the first year of the pilot, a team of cardiac professionals from Indiana, USA, traveled to



Uganda, where they performed pediatric heart surgeries on children while training their Ugandan counterparts on the techniques they used. They saved many lives, but also ensured that local doctors would be able to save even more lives in the future.

### **What are the areas of focus and how were they selected?**

The six areas of focus are:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

These areas were identified as critical humanitarian issues that Rotarians were already addressing worldwide. The Trustees agreed that previous Rotarian experience and interest in these areas would promote greater member engagement and project success.

### **What is sustainability and why is it important?**

The Rotary Foundation defines sustainability as the capacity for maintaining outcomes long-term to serve the ongoing need of a community after grant funds have been expended. A sustainable project typically involves local community leaders in planning so that they are invested in the project's long-term success. Training and the exchange of information prepare communities to maintain results and solve problems on their own, after the Rotary club's involvement has ended. Sustainable projects offer enduring value and a greater return on Rotary's investment of money and volunteer hours.

### **What are strategic partnerships and how do they work?**

A strategic partnership is a relationship between The Rotary Foundation and another international organization that has a unique or specialized knowledge or expertise in one or more of the areas of focus. Strategic partnerships are large-scale, multi-year relationships. Rotary's strategic partners provide financial resources, technical expertise, advocacy, or a combination thereof. These relationships will produce mutually beneficial project portfolios that fulfill the goals of the partners and enhance service opportunities for Rotarians through packaged global grants .

### **What is the timeline for the Future Vision global launch?**

All districts will begin using only the new grant model on 1 July 2013. However, nonpilot districts should begin preparing for the transition much earlier. District governors-elect will receive training at the 2012 International Assembly, and DGEs and district Foundation chairs will be trained at the 2013 assembly. This training will prepare them to complete the online qualification process, train and qualify clubs, and apply for district grants before the launch. More information can be found in Transition to Future Vision and the Future Vision newsletter.

### **How is Rotarian input and feedback being used to improve the new grant model for the worldwide launch?**

Pilot districts have already provided the Foundation with recommendations for



improvement. For example, major improvements are being made to the online application to make it easier to use.

Surveys of pilot districts indicate that most are happy with many aspects of the plan. For example:

- 85% of respondents strongly or somewhat agree that the district MOU requirements improved their district's stewardship practices.
- Districts are generally satisfied with the transition to the online system and the elimination of paper applications and feel that this process is easier.
- The sense of ownership has increased at the district and club levels
- One district reports: "We have found better participation by clubs in our district. We have used our grant funds for a great variety of local and international projects and some clubs have combined with others for larger projects."
- Another district reports that their vocational training team had a much higher impact on their communities than GSEs.
- More clubs are participating in international projects and starting multi-club projects.

### **Why did The Rotary Foundation develop this new grant model?**

The Foundation recognized the need to use its limited resources more effectively. In 2007, the Foundation was spending 20 percent of its annual program budget on large grants with high impact and 80 percent on short-term activities with minimal impact. The new grant model will flip these percentages so that 80 percent will support high-impact, sustainable projects.

The Foundation also identified a growing need to streamline its operations for improved efficiency and focus its efforts to make greater impact. For example, the increasing demand for small Matching Grants was driving up administrative costs without a corresponding return in terms of impact or public recognition.

The Trustees based many of the plan's key elements on survey results from Rotary leaders and grassroots Rotarians. Rotarian input continues to be a key factor as pilot districts report back on their successes and challenges. In April 2012, the Trustees will incorporate this feedback into the final plan.

The ultimate goal is to use Foundation resources more strategically by supporting projects that will make a greater impact on communities worldwide, affect a significantly larger number of beneficiaries, and enhance Rotary's public image. Greater recognition of Rotary's work will, in turn, lead to increased interest in joining Rotary and supporting its civic and humanitarian efforts.

### **How will the Foundation know if Future Vision is a success?**

Several factors can help the Foundation measure the success of the new grant model over time—among them, increased Rotarian participation in grant activities, increased giving to the Foundation from both members and non-Rotarians, and more media coverage of Foundation-sponsored projects. But the real success indicators will come through the evaluation process, which will provide data on the actual number of people who benefit from Foundation grants and demonstrate how the sustainability factor will ensure the continuation of those benefits. *Reprinted from [www.Rotary.org](http://www.Rotary.org).*



## Insert OF-2: Foundation Facts - Giving

(Data is for most recent Rotary year available at time of publishing)

As of 30 June 2011 in US\$ — 2010-11 data unaudited

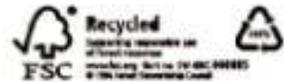
### SUMMARY STATISTICS

	2010-11	Cumulative
<b>Contributions</b>	<b>\$208.5 million</b>	<b>\$2.87 billion</b>
Annual Programs Fund	\$107.7 million	\$1.81 billion
Permanent Fund	\$16.3 million	\$192.8 million
PolioPlus Fund	\$78.9 million	\$831.5 million
Other	\$5.6 million	\$37.6 million
<b>Program Awards and Operations</b>	<b>\$168.6 million</b>	<b>since 1947: \$2.58 billion</b>
Arch C. Klumph Society	44	314
Major Donors	1,348	14,195
Bequest Society	609	7,729
Benefactors	2,978	86,352
New Paul Harris Fellows	61,501	1,304,583

*The mission of The Rotary Foundation of Rotary International 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.*

For additional information, contact:

Office of the General Manager  
 The Rotary Foundation, One Rotary Center,  
 1560 Sherman Avenue, Evanston, IL 60201 USA  
 Telephone: 847-866-3000 Fax: 847-328-8554  
[www.rotary.org](http://www.rotary.org)



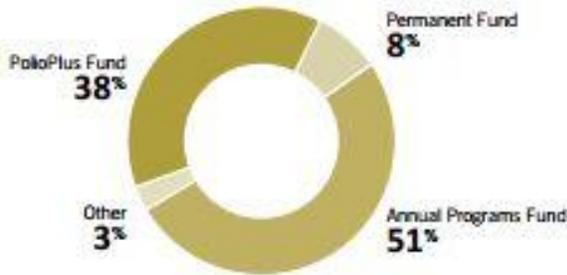
Cover photo: Rotary Images/Alyce Henson

Worldwide Rotarian support for the Haiti Earthquake Relief Fund, which raised and distributed more than \$2 million, helped provide clean water and other essentials to families in Haiti.

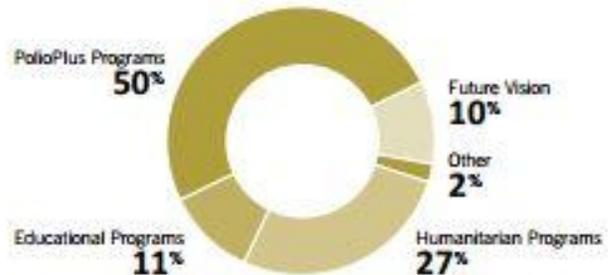
© 2011 Rotary International

159-EN—(1111)

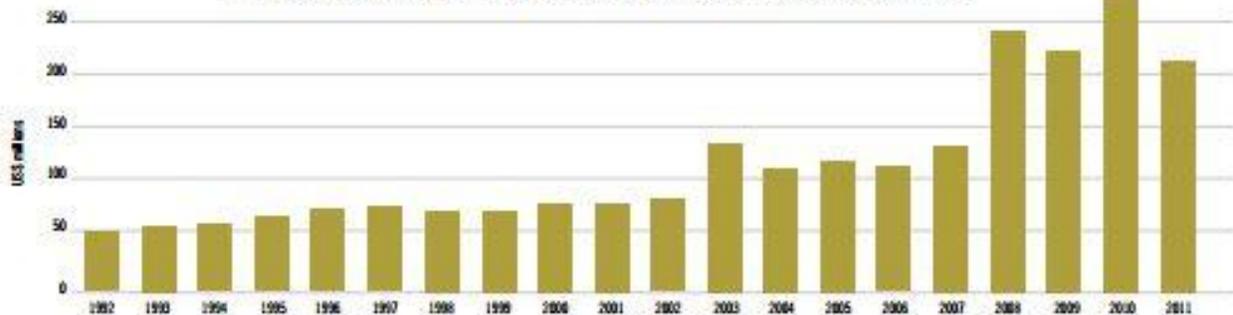
**2010-11 TOTAL CONTRIBUTIONS** (\$208.5 million)



**2010-11 PROGRAM AWARDS** (\$150.2 million)



**THE ROTARY FOUNDATION TOTAL CONTRIBUTIONS OVER 20 YEARS**





# Ethics – Vocational Service

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 Rotarians promote the 4-Way Test in their community and professional life, in all stages of life?

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

How do I make my vocation useful to Rotary?

## Materials

-   Insert EVS-1: The Guiding Principles of Rotary
-   Insert EVS-2: Vocational Service Ideas
-   Article: The Four Way Test Means Business (0709)
-   Applying the 4 Way Test. 502-EN-(495)
-  Organizing a 4 Way Test Essay. [www.4waytest.org](http://www.4waytest.org)
-   Vocational Service Month
-   Rotary Volunteer Handbook. 263-EN-(1007)
-   Service Is Our Business. Hodgson & Watchurst.  
<http://www.rotaryfirst100.org/library/ServiceIsOurBusiness/Service.htm>
-   E-Learn Vocational Service

**Key:**  attached insert  online  article  ppt

This is a course in the Rotary Membership Spiral going across the three days of RLI. Other courses in this section include My Rotary, and Engaging Members. Additional courses building on this session are Attracting Members, and Rotarians, Vocational Service and Expectations. Service and Leadership have separate spirals.

## Session Topics

- 1) What is a “classification” in Rotary? Give examples of classifications. Discuss why everyone in Rotary has a classification? How does having a classification relate to “vocational service”?



- 2) What is “vocational service”? What is my vocational service “responsibility” as a Rotarian? How is it stated in the Second Object of Rotary? (See Insert EVS-1)
- 3) Give examples of “high ethical standards”? How can I promote them in my workplace and community?
- 4) What is meant by “recognizing useful occupations”? How do we do this as individuals or in our clubs?
- 5) How can I promote Rotary in my business or profession? Is this necessary? What are the benefits, if any? How do I do this with my co-workers, my boss, manager or employer, or those who work for me?
- 6) What is “social responsibility” and why is it important? What is my role in advancing “social responsibility” within my community, and particularly with our youth?
- 7) How do Rotary’s Guiding Principles (Insert EVS-1) relate to me? The “Four Way Test”? The Object of Rotary? The Rotary Code of Conduct? The “Five Avenues of Service”?
- 8) What does your club do in vocational service? Within your club? for youth? for the community? What impact do you see? Can you measure it? Does your club “network”?
- 9) How can we educate our club members and our community about ethics?
- 10) How can you encourage your club to be more involved in vocational service activities? What are some easy vocational project ideas that you can take back to your club?

*“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*



## Insert EVS-1: Guiding Principles of Rotary

<p style="text-align: center;"><b>The Object of Rotary</b></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;"><b>The Five Avenues of Service</b></p> <p>Based on the Object of Rotary, Rotary's Philosophical cornerstone and foundation of club' activity:</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>New Generations Service</u> recognizes the positive change by youth &amp; young adults via leadership and involvement.</p>
<p style="text-align: center;"><b>The Four-Way Test</b></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"> <li>1. <b>Is it the TRUTH?</b></li> <li>2. <b>Is it FAIR to all concerned?</b></li> <li>3. <b>Will it build GOODWILL and BETTER FRIENDSHIPS?</b></li> <li>4. <b>Will it be BENEFICIAL to all concerned?"</b></li> </ol>	<p style="text-align: center;"><b>Rotary Code of Conduct</b></p> <p>As a Rotarian, I will</p> <ol style="list-style-type: none"> <li>1. Exemplify the core value of integrity in all behaviors and activities</li> <li>2. Use my vocational experience and talents to serve in Rotary</li> <li>3. Conduct all of my personal, business, and professional affairs ethically, encouraging and fostering high ethical standards as an example to others</li> <li>4. Be fair in all dealings with others and treat them with the respect due to them as fellow human beings</li> <li>5. Promote recognition and respect for all occupations which are useful to society</li> <li>6. Offer my vocational talents: to provide opportunities for young people, to work for the relief of the special needs of others, and to improve the quality of life in my community</li> <li>7. Honor the trust that Rotary and fellow Rotarians provide and not do anything that will bring disfavor or reflect adversely on Rotary or fellow Rotarians</li> <li>8. Not seek from a fellow Rotarian a privilege or advantage not normally accorded others in a business or professional relationship</li> </ol>



## Insert EVS-2: 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.
  - b. Use Rotary's ProjectLINK database to identify a project in need of your specialized vocational skills.

From An Introduction to Vocational Service 255-EN (1009)



# Service Projects

I am a vital part of a worldwide service organization of business, professional and community leaders meeting needs in communities



## Session Goals

How can I, as an individual Rotarian, plan, lead and implement a service project in my club?

How can I encourage creativity and sustainability in my club's projects?

## Materials

 Insert SP-1: Service Project Questions

  Communities in Action: A Guide to Effective Projects. 605A-EN (1006)

  Community Assessment Tools. 605C-EN (1006)

  Working in the Community

  Club President's Manual 222-EN(910)

Key:  attached insert  online  article  ppt

This is a course in the Service Spiral going across the three days of RLI. Our Foundation is also a course in this session. Additional courses building on this session are Targeted Service, International Service, Rotary Opportunities, and Making a Difference. Leadership and Membership have separate spirals.

## Session Topics

- 1) You have been appointed to chair a committee to develop a new service project for your Rotary Club.
  - a) How do you start?
  - b) Delineate the steps you should take.
  - c) Establish the procedure you would use to identify a need in your community.
  - d) How do you determine the feasibility and advisability of a project?

*“The time we take to serve those who need us can be the turning point, not only in their lives but also in our own.”*

*1980-81 RI Pres. Rolf Klarich  
— Take Time to Serve  
THE ROTARIAN, July 1980*



- e) How can your club raise or obtain the necessary funding? Is there a difference between fundraising and a community service project? If so, can they be done in the same activity?
  
  - f) What factors are necessary to make your project work?
- 2) Outline a “business plan” for a service project.
- a) Cover funding
  
  - b) Procedure to bring project to fruition
  
  - c) Gaining support of club members and the community
  
  - d) Time line
- 3) Creating Service Project
- a) Divide into groups
  
  - b) Follow outline in the “business plan.”
  
  - c) After completion, review the plan for “outside the box”, creative alternatives or additions to the project. How can you make it “bigger, better, and bolder”?
- 4) Fundraising



- a) Discuss the differences between a community service project and a purely fundraising event.
  
- b) How creative are Rotarians with service projects and fund raising projects?
  
- c) How much risk do we or should we take with service and fund raising projects?
  
- d) Share fundraising ideas from Rotary Clubs that can help raise funds for “hands-on” projects.

## **SUMMARY**

Good Rotary Service projects require:

- Meeting a need today
- Creativity
- Sustainability
- Risk taking
- New ideas
- Keeping prior projects only if viable today!



**Insert SP-1:**  
**Service Project Questions**

1. Can a Rotary club do anything to help?
2. If so, what can Rotarians do “hands on” to help?
3. How much funding is required?  
Fundraising?
4. How can the project be designed?  
What is needed?
5. Will the project generate good publicity for the club?
6. Can the members be "sold" on the project?
7. Is this a one-year project or a continuing project?
8. What other community resources are available or what other organizations should be involved?
9. What are the steps necessary to move forward?



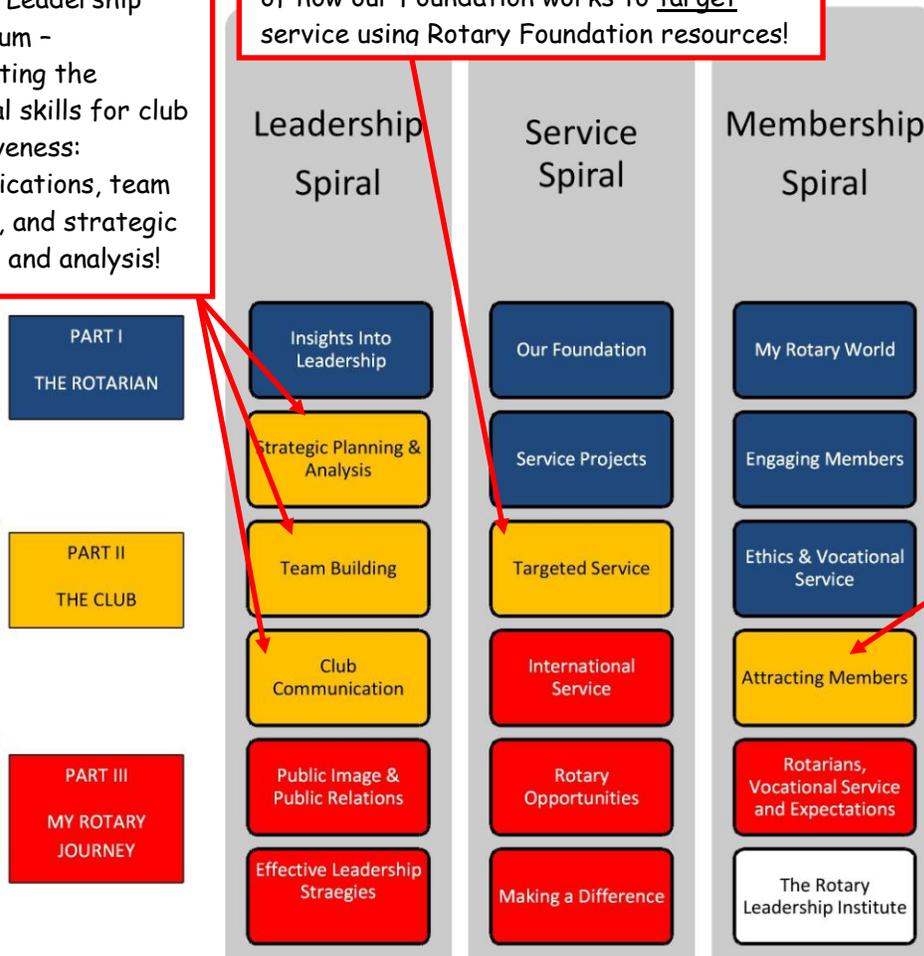
# Coming Attractions- Previewing RLI Part II

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!

Spring from the introductory Insights Into **Leadership** course into the core of the RLI Leadership curriculum - highlighting the essential skills for club effectiveness: communications, team building, and strategic planning and analysis!

Combine the practical mechanics of building a **Service** project with the basics of how our Foundation works to target service using Rotary Foundation resources!

Clarity of purpose and knowledge of what it means to be an engaged, ethical Rotarian leads to analysis of one of the most difficult issues facing Rotary clubs: How can my club attract **Members** that share our values and commitment?



**\*\*\* Sign Up for RLI Part II Now! \*\*\***