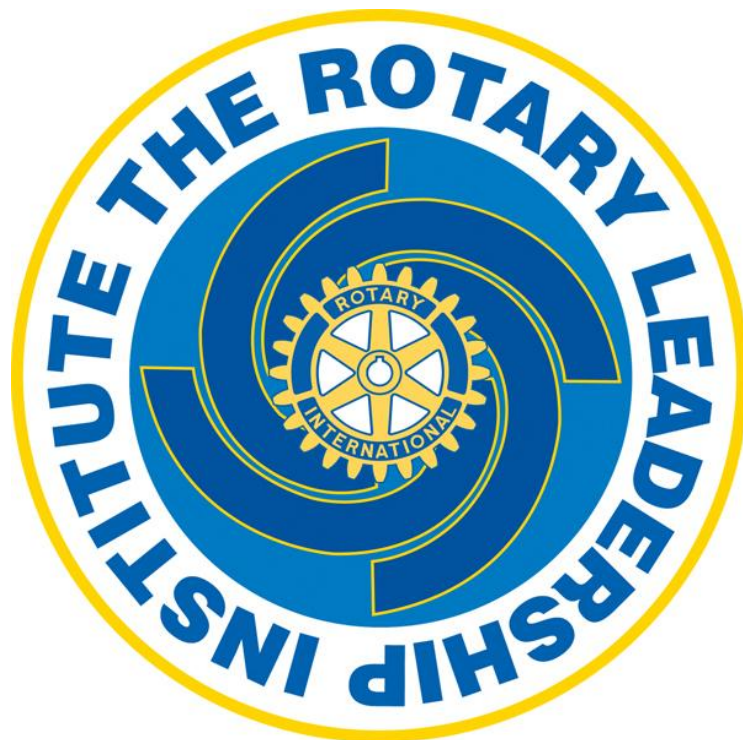


RLI

20th

ANNIVERSARY

A Joint Project of over 300 Rotary Districts worldwide



2012-15

*Twentieth Anniversary Edition
(with updated Service sessions)*

FACULTY- PART II



RLI Part II – THE CLUB 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.

FACULTY
PAGE NOS.

PARTICIPANT
PAGE NOS.

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.



Strategic Planning & Analysis

FACULTY 1

1

I can strengthen my club by promoting and leading insightful planning and analysis. Looking at my Rotary club, how can I help make improvements that will matter?



Targeted Service

FACULTY 19

17

I can lead and promote my club's participation in unique, significant and targeted service opportunities through our Foundation. Understand the key concepts of Rotary programs!



Club Communication

FACULTY 29

25

I can serve by leading and promoting effective communications to my club's internal and external audiences. Refine and practice your skills.



Team Building

FACULTY 35

31

I can lead and promote my club's collaboration in effective and motivated groups to accomplish our goals of service. Harness the real power of Rotary clubs and Rotarians!



Attracting Members

FACULTY 41

37

I can lead and promote my club's reexamination of its distinctive position in my community and the quality of members we attract. I want to work with the best people!

Coming Attractions

42

Course Evaluation

Handout



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.

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 www.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

ARGENTINA CENTRAL/SOUTH & BOLIVIA

PDG Juan Pedro Torroba, Chair
PDG Miguel A. Martinez

ATLANTIC/ ATLANTIQUE

PP Kim Pearson, Chair

BUENOS AIRES & PERU

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HEART OF AMERICA (US)

PDG Jane Malloy, Chair
PDG Bob Malloy

S. ASIA (INDIA/ NEPAL/ SRI

LANKA)

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PRID Masahiro Kuroda, Chair

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PDG Knut Johnson, Training Chair

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PDG Toni McAndrew, Chair

PDG Tam Mustapha, RLI-Int V.Chair

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PDG Yves Fecteau, Chair

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PDG Claude Martel

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DGN Robert "Bob" Arnold

PDG Jim Henry, Past Chair

PDG Gary Israel, Chair

Debbie Maymon, Registrar

PDG Doug Maymon, Chair-Elect

Brenda Wendt, Secretary

ZONE 33 (MID-ATLANTIC US/ CARIBBEAN)

PRID Eric Adamson, Past Chair

PDG Bevin Wall, Ex. Director

Pam Wall, Faculty Trainer



Strategic Planning and Analysis



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

| Session Goals | Materials |
|--|---|
| <p>Analyze Your Rotary Club</p> <p>Review Possible Areas of Improvement</p> <p>Discuss How Specific Improvements Should be Made</p> <p>Understand the Process for Strategic Planning</p> | <p>  <u>Insert SPA-1</u>: Rotary Club Self-Evaluation of Performance & Operations</p> <p>  <u>Insert SPA-2</u>: Strategic Planning Guide. <i>EN (109)</i></p> <p>  <u>Insert SPA-3</u>: RI Strategic Plan Priorities & Goals 2010</p> <p>  Planning Guide for Effective Rotary Clubs 862-<i>EN</i>-(411)</p> <p>  What Will Rotary Look Like in 10 Years?</p> <p>Key:  <i>attached insert</i>  <i>online</i>  <i>article</i>  <i>ppt</i></p> |

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

This course is a recommended double session

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) After performing the Self-Evaluation, what areas of improvement are apparent? Are these improvements specific to your club, or do they have a wider application to other Rotary clubs? ***As to the Self-Evaluation, the Facilitator picks one topic for the class to fill out or divides different topics among small***

“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



groups. Time prohibits one person or group filling out the entire survey. From the results of the group work, create a 3-year goal as set forth at Question 6.

- 3) After completing the preceding two questions, see the Strategic Planning Guide and Worksheet, Insert SPA-2, and related questions.
- 4) Rotary International suggests that clubs develop strategic plans. What is a strategic plan? Why do we need one? What are the benefits? **Refer to Insert SPA-2 and SPA-3.**
- 5) There are many ways to do strategic planning, and some of your club members may have experience with a particular process. How can you discover and use this expertise? Are there other people resources you can call on for assistance?
- 6) Review and discuss the Strategic Planning Guide and Strategic Planning Worksheet recommended by Rotary International (Ex. SPA-2).
- 7) Based on your previous Self-Evaluation result “areas of improvement”, develop at least two three-year goals and an annual goal for each one. What strategy are you going to use to accomplish each goal? How can you insure accountability?
- 8) Rotary International has a Strategic Plan. (See Insert SPA-3). 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?
- 9) What is your Rotary club’s “brand” or “distinctive position” in your community? Is it different than the “brand” of Rotary International? Is defining your club’s “brand” important for strategic planning? How do you define your club’s brand?

“...There is so much pleasure in Rotary activities. The breakfast, luncheon, or dinner every week brings you in 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



- 10) 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?



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 an e-mail address and/or web 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 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 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 **weekly** (5 pts), **monthly** (3 pts), **never** (0 pts). _____
- 36. The club newsletter is published **weekly** (5 pts), **bi-weekly** (3 pts), **monthly** (1 pt), **none** (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 rules on attendance are **always** (5 pts), **usually** (4pts), **occasionally** (3 pts), **seldom** (2 pts), **never** (1 pt) strictly enforced. _____



- (3 pts), **never** (0 pts) notifies the nearest Rotary club 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, 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 all 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 knows _____

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. **Most** (5 pts), **many** (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 GSE team member, an ambassadorial scholar, a university teacher or a peace 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 GSE team **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 applied for a Matching 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 Simplified 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 Rotary Volunteer Grant or 3-H Grant **within the last 1 yr** (5 pts), **2-4 yrs** (3 pts), **longer or never** (0 pts), don't know (DK). _____

16. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Paul Harris Fellows _____

17. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Paul Harris Sustaining Members _____

18. **Most** (5pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are bequest donors to The Rotary Foundation. _____

19. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) club members are benefactors to The Rotary Foundation _____

20. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts) **none** (0 pts) of club members are Paul Harris Society members _____

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

22. **Most** (5 pts), **many** (4 pts), **some** (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 knows _____

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 is _____
- 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 normally 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 World Community Service project a year. _____
- 20. The club participates in or recognizes the Rotary UN day at the United Nations headquarters. _____
- 21. The club has participated within the last 3 years in a Rotary Friendship Exchange. _____
- 22. Within the last 3 years, the club has participated in a Twin Cities, Sister Club, or Matched Club program with 1 or more Rotary clubs around the world. _____
- 23. The club, within the last 3 years has sponsored a student(s) with a Rotary Youth Leadership Award (RYLA). _____

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

Rotary Publicity and Public Relations

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

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

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



- within the last 2 years. _____
- 8. Local Rotarians have been interviewed about the club on radio or TV within the last year. _____
- 9. Representatives from the media are active members of the club. _____
- 10. The club has a brochure describing the club and its projects available for handout. _____
- 11. The Rotary logo and club identification is visible for completed community service projects. _____

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

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

Bonus Questions

- 1. I receive the Rotarian magazine each month. (Y=5, N=0) _____
- 2. I have received or am familiar with the District Governor's 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) |
| | <i>Your score</i> | <i>DK's</i> |
| Rotary Service (23 questions) | _____ out of 173 points | _____ (22) |
| Publicity & Public Relations (11 questions) | _____ out of 55 points | _____ (6) |
| Bonus Points (11 questions) | _____ out of 55 points | |
| Total points | _____ out of 793 points | |
| Total Don't Knows (DK) | _____ out of 105 questions | |

Grand Total

700 points plus = Outstanding

600-699 points = Excellent

500-599 points = Very Good/Average

400-499 points = Could be improved

300-399 points = Caution- club may need assistance

less than 300 points – The club is in need of serious and immediate assistance

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

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

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

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

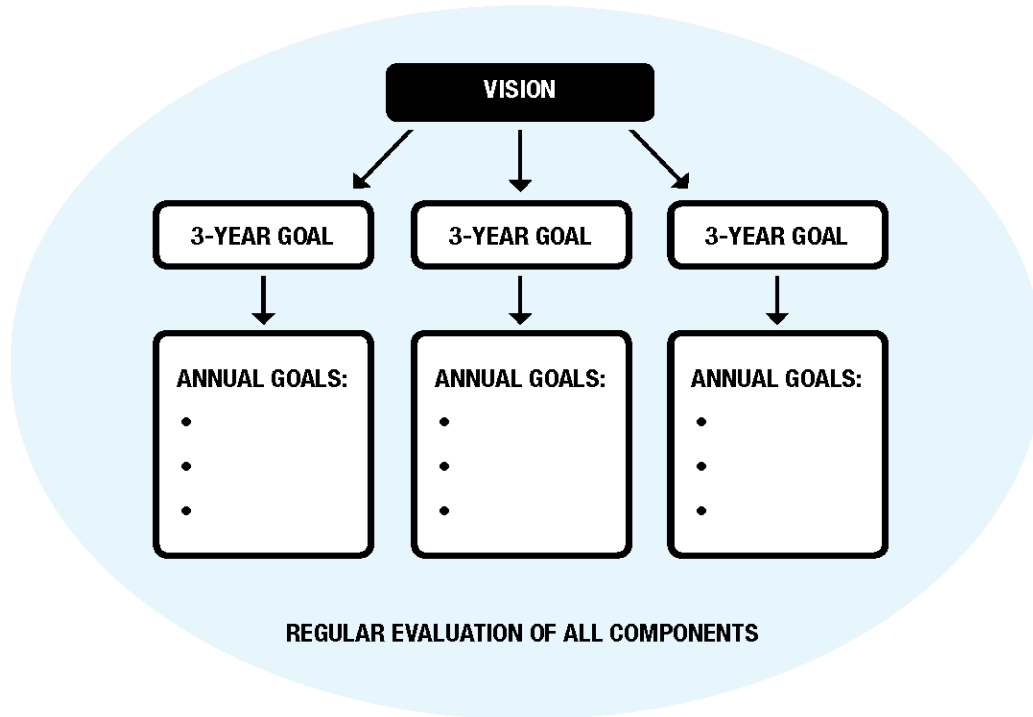
36 or more – **Unacceptable-** Unless you're a new member, you need to seriously learn more about the functioning of your club.

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



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

Insert SPA-2: Strategic Planning Guide (3 pages)



The Strategic Planning Model

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

Process

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

1. **Where are we now?**
 - Describe your club’s current state.
 - Brainstorm your club’s strengths and weaknesses.
2. **Where do we want to be?**
 - Create a list of 5-10 characteristics that you would like to see in your club three years from now.
 - Draft a one-sentence vision statement describing your club three years from now.
 - Finalize the vision statement, making sure that all participants support it.
3. **How do we get there?**
 - Brainstorm three-year goals that will help your club achieve the vision, considering:
 - Strengths and weaknesses of the club
 - Programs and missions of RI and its Foundation
 - Involvement of all members
 - Achievability in three years
4. **How are we doing?**
 - 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.
 - Create a strategic planning team to regularly monitor progress and recommend revisions to the plan.
 - Allocate sufficient resources for the plan’s implementation.
 - Evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
 - Review the strategic plan annually, including the vision statement, three-year goals, and annual goals, and revise as needed.
 - Repeat the full strategic planning process every three years to create a new plan or affirm the current one.



Strategic Planning Worksheet

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

1. Where are we now? _____

Today's date: _____

Describe your current state:

Strengths:

Weaknesses:

2. Where do we want to be? _____

Target date: _____

Key characteristics of future state:

Vision Statement:



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:



Insert SPA-3: RI Strategic Plan Priorities & Goals

The revised strategic plan, effective 1 July 2010, identifies three strategic priorities supported by 16 goals:

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



Targeted Service (Foundation II)



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









Session Goals

Review the Rotary Foundation Grant Model

Discuss the importance of the Grant Model to your club

Discuss the Importance of the Six Areas of Focus and Sustainability

Materials

-  Insert TS-1: Targeted Service Case Studies
-  Insert TS-2: Grant Model Flowchart
-  Insert TS-3: SHARE Flowchart
-  Insert TS-4: Areas of Focus Chart
-  Insert TS-5: What is Sustainability?
-   Rotary Foundation Reference Guide 219-EN (114)
-  Learning & Reference page at Rotary.org
<https://www.rotary.org/myrotary/en/learning-reference>

Key:  attached insert  online  article  ppt

This is a course in the Service Spiral going across the 3 days of RLI. Prior courses include Our Foundation and Service Projects. Additional courses building on this session are 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 and the programs of our Foundation, you should consult your district for specific Rotary Foundation training opportunities.

Session Topics

- 1) What is the Mission of our Rotary Foundation? *Review from Part I: Our Foundation. 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.*

- 2) What are the categories of grants in the Foundation Grant Model? How can each grant type be used? *Refer to Table after Q9 (and Faculty Notes following). Note that “Packaged Grants” were discontinued 4/2014. Refer to discussion for Q.3 and Q.7.*



- 3) How does the new Grant Model benefit your club and district? (a) *Easier to understand as only 2 grant types, down from 12. Packaged Grants were initially in the Grant Model, but by Trustee Decision of 4/2014 they are being phased out in 2014-15 by being allowed to expire.* (b) *More effective, targeted service, with higher percentage of budget now going to large-scale, high-impact, sustainable grants.* (c) *Control of grant decision-making is now much closer to the club level.* (d) *More input from Rotarians is being sought as Districts are encouraged to survey Rotarians and find out what they want to do with grant funds.* (e) *Streamlining of the grant process is up to the District.* (f) *Education of club members is now required to qualify for grants. From Global Outlook: a Rotarian's Guide to the new Foundation Grants (updated by RLI).*
- 4) How do the Annual Fund, the Endowment Fund, and the World Fund work together to fund grants? *See Insert TS-3 SHARE Flowchart.*
- 5) What are the Areas of Focus and why are they important? *The Six Areas of Focus are: (a) Peace and conflict prevention/resolution, (b) Disease prevention and treatment, (c) Water and sanitation, (d) Maternal and child health, (d) Basic education and literacy, (e) Economic and community development. The Six Areas of Focus are important because: (a) they reflect critical humanitarian issues and needs worldwide, (b) Rotarians are already addressing them, (c) they align Rotary with other international developmental efforts, and (d) it strategically furthers the mission of The Rotary Foundation. See Insert TS-4: The Areas of Focus Chart.*
- 6) What is the value of sustainability in projects? *In 1983 the Brundtland Commission, convened by the United Nations issued a report that established the oft-cited definition of sustainable development as "meeting the needs of the present without compromising future generations' ability to meet their own needs." Today, considerations about sustainability affect many of our daily activities. Businesses have learned that sustainable practices can increase profits, and governments have found that sustainable development can have environmental, economic and social benefits. For an international organization like Rotary, using the principles of sustainability to inform humanitarian work helps extend the impact of Rotarians' global projects and ensure that communities benefit from their good works for*

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



years to come. From Global Outlook: a Rotarian's Guide to the Sustainability. See further, Insert TS-5: What is Sustainability?

From The Rotary Foundation Resource Guide: For The Rotary Foundation, sustainability means providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends. Global grant projects must be sustainable and display the following characteristics:

- 1. Community needs — The host community and Rotary project sponsors develop projects based on the community's assessment of its needs and strengths.*
 - 2. Appropriate technology — Project materials are appropriate for the community and, ideally, are purchased locally.*
 - 3. Sustainable funding — The community is able to sustain the project without ongoing financial support from The Rotary Foundation or other Rotary sources.*
 - 4. Knowledge transfer — The project includes teaching beneficiaries how to address their ongoing needs after the project is completed.*
 - 5. Motivation — The community is able to assume ownership of the project upon its completion.*
 - 6. Monitoring and evaluation — The project includes a measurement plan to confirm significant improvement, ideally for at least three years.*
- 7) Why are partnerships with other organizations significant? Clubs can strengthen their service projects by collaborating with individuals, organizations, and Rotarian-sponsored groups that are based in the community being served or that have expertise in a particular area of service. Working with partners can help even small projects achieve a greater impact, and can help established projects become more effective and sustainable. (Excerpted from Club Service Projects Committee Manual, P.6, revised by RLI)*

Note that Rotary and The Rotary Foundation uses the term “partner” in many different contexts, from our “partners” in the polio eradication effort, to encouraging clubs to develop “partners” in their community to support their activities and projects.

Note that by Trustee Decision of 4/2014, formal “Strategic Partners” in the Grant Model are being phased out along with “Packaged Grants”. “Strategic Partners” were organizations or institutions with whom Rotary had a formal relationship to secure resources such as funding, advocacy, or technical expertise to enhance Rotarian



service opportunities through the creation of packaged global grant opportunities (large-scale, sustainable projects supporting our areas of focus). They were non-profit organizations, universities, and corporations that: (a) Have a global scope of work – organizations that are peers of Rotary, (b) Are working in districts with Rotary clubs, (c) Have technical expertise in one or more of the six areas of focus, (d) Have successfully worked with Rotarians or are interested in working with Rotarians, (e) Can provide increased service opportunities for Rotarians, (f) Can contribute at least US\$1 million in cash or in-kind contributions to the relationship. While this formal designation has been phased out, the positive aspects of partnering with these types of organizations for other service projects or grants are still important considerations.

- 8) Breakout and Consider the Case Studies. ***Suggested Facilitation Technique.*** *Divide into groups of about 3-4 participants each and assign the case studies. Have them refer to the Inserts TS-2 Grant Model Flowchart, TS-3 SHARE Flowchart, TS-4 Areas of Focus Chart & TS-5 What is Sustainability? Have a different people in the group report on each question, including the case summary. Alternate division would be for each in group to explain how they analyzed their case study using a specific Insert. Give adequate time for reporting back to the entire group. Sub-groups can be combined into 2 larger groups, one for each case study, to compare results before presentation. Tie in these projects to Q9.*
- 9) How can the Grant Model encourage Rotarians to participate and contribute? ***Through Rotary Foundation participation and support, your club can make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and keep members. When Rotarians experience Foundation programs directly, they can be inspired to contribute to The Rotary Foundation. See Q3 for Club and District benefits. A program where decisions are made by district or club level Rotarians, that are simple enough to understand, that are more effective, and that Rotarians know about because of surveys and continued education, are more likely to engage Rotarians to participate and support.***

Note on Funding Model Changes. *There are numerous Funding Model changes effective July 1, 2015. The key change is that not all Annual Fund contributions will fund project costs after the three year investment cycle, some will fund operations. This will affect the World Fund and will not affect District Designated Funds (DDF). In “THE DETAIL” on Insert TS-3: Share Flowchart, it is explained as follows: “Under those changes, the World Fund would be reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund.” More information on the changes is detailed in the Rotary Foundation published flyer entitled “Securing our Foundation’s Future”*



published April, 2014. RLI Faculty are encouraged to read this document and update this information for more recent changes, as more changes may occur. Participants should be encouraged to consult with their District Foundation leadership if they have any more detailed questions.

Can the Grant Model help a club's public image? Programs that are effective, make a big difference in the outcome for others, and are easily to explain can be more readily and effectively communicated to others, whether inside the club, or outside the club. Those in the media are interested in a big story with local involvement.

Conclusion of Session

- *Summarize that Goals of Session have been met and how: Discussed:*
 - *Reviewed the Grant Model*
 - *Discussed the importance of the Grant Model to your Club*
 - *Discussed the concepts of the Areas of Focus and Sustainability*
- *In the Our Foundation session in Part I, we hope you were inspired by the great things that our Rotary Foundation is doing in the world.*
- *In this session, our overarching goal is to provide you with some of the terminology, tools, key concepts and methods of the Grant Model.*
- *Projects that you start in your club can turn into the next Polio Eradication Campaign, or can spread across a continent to give people less fortunate than we are clean water, education, or a chance at a better life.*
- *Now that you know what is available, we encourage you to use those tools, learn more from your district grant seminars, develop your Rotary contacts, and get out there are start doing the work of Rotary- "Doing Good in the World".*
- *In a world filled daily with bad news of poverty, crime, and misfortune, we are a force for good in the world. We are making a difference. You are making a difference.*



| Foundation Grant Model | | |
|--|---|---|
| District Grants | Global Grants | Packaged Grants * |
| Fund small-scale, short-term activities that address needs in your community and communities abroad. Each district chooses which activities it will fund with these grants. | Support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. Grant sponsors form international partnerships that respond to real community needs. | Designed by Rotary and our strategic partners to help Rotarians carry out large-scale, sustainable projects. Because the projects framework is provided, you can focus your energy and expertise on doing the project |
| Humanitarian projects, including service travel and disaster recovery efforts; Scholarships for any level, length of time, location, or area of study; Vocational training teams and Group Study Exchange. | Requires clubs in two countries. Funds Scholarships, humanitarian projects, and vocational training. | Like global grants, packaged grants support our areas of focus and can include scholarships, humanitarian projects, and vocational training. <i>*Discontinued effective 2014-15</i> |

Note on District Grant Changes: District Grants (but not Global Grants) can now additionally fund (a) Rotary Youth Exchange, RYLA, Rotaract or Interact, (b) Construction, including low cost shelters, (c) Travel for staff of cooperating organizations, (d) Activities primarily implemented by an organization other than Rotary. Further, educational and humanitarian training events are now allowable. (April 2014, Trustee Decision 96)



Insert TS-1: 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?

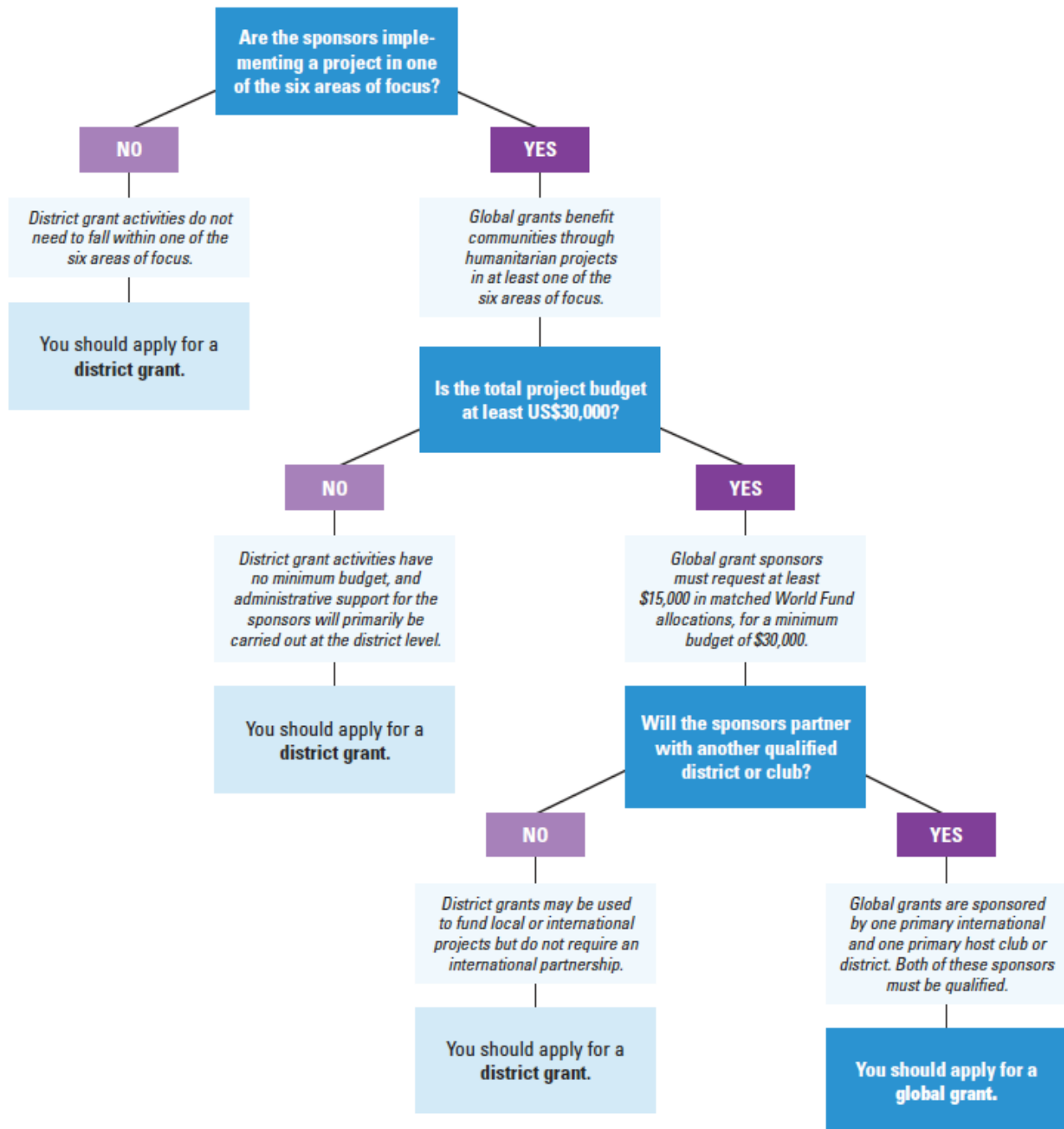
Each group reports back to the whole group on each question explaining their reasoning for their answers.



Insert TS-2: Grant Model Flowchart

Determining a Grant Type for a Humanitarian Project

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

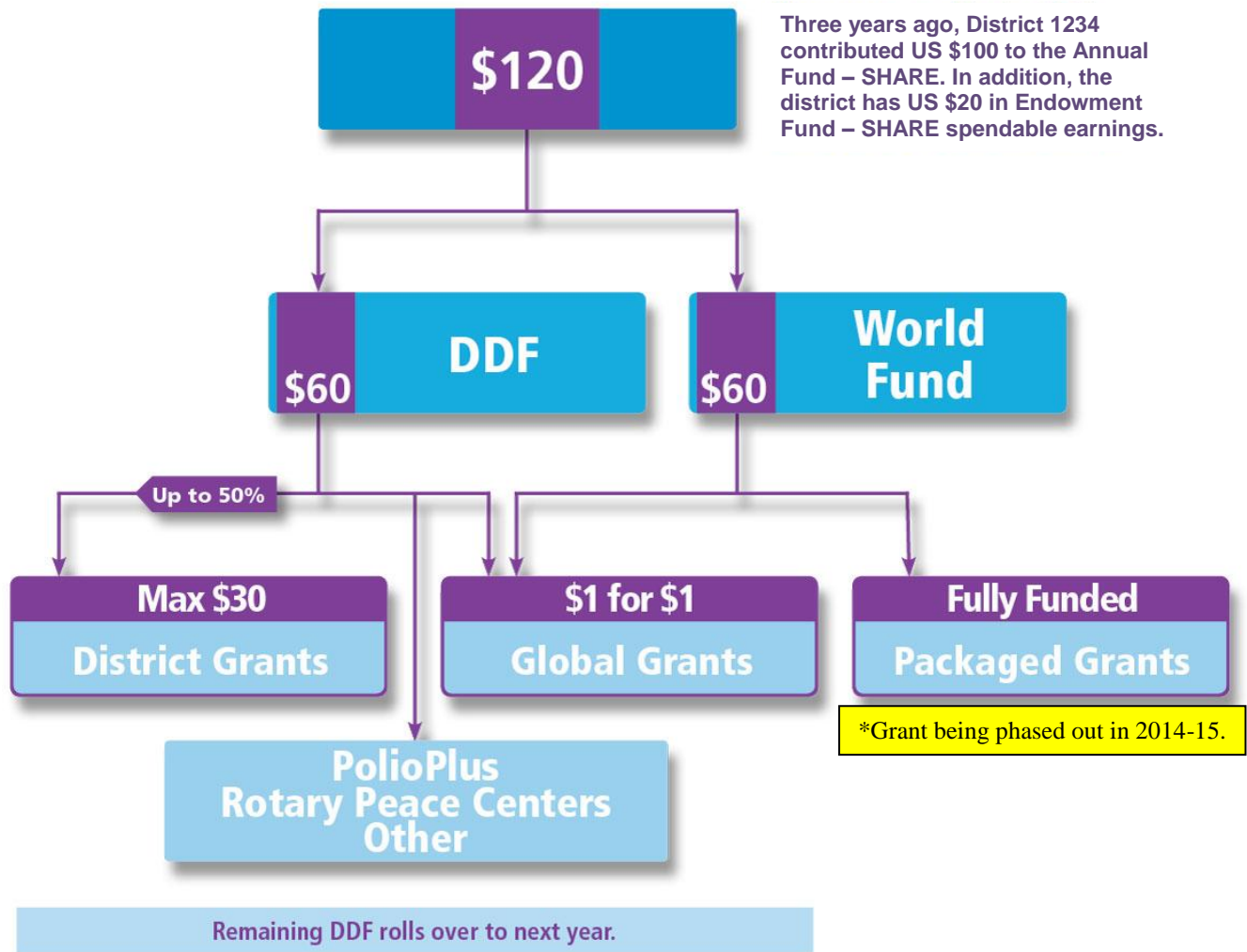


Ref: TRF Training Workbook Jan 2013 17-19 San Diego CA USA



Insert TS-3: SHARE Flowchart

SHARE System









THE DETAIL. How does the SHARE System work? Annual Fund contributions are invested for a three year period. In the third year, the money is divided 50/50 between the district and the World Fund (WF). The district's part of the funds are called "District Designated Funds" (DDF). Districts can use up to 50% of their DDF to pay for club and district projects through District Grants. The remaining DDF may be used for Global Grants or donated to PolioPlus, the Rotary Peace Centers, or another district. If DDF is not used in a given year, then it accumulates in the district's account and may only be used thereafter for Global Grants. World Fund contributions are used to match Global Grants and formerly to fund Packaged Grants*. The World Fund matches DDF (1:1), and cash (0.50:1), for contributions to a Global Grant. District Grants can be any amount while Global Grants must be at least US\$30,000. Numerous Funding Model changes will become effective July 1, 2015, however none currently affect DDF. Under those changes, the World Fund would be reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund.



The Rotary Foundation Areas of Focus

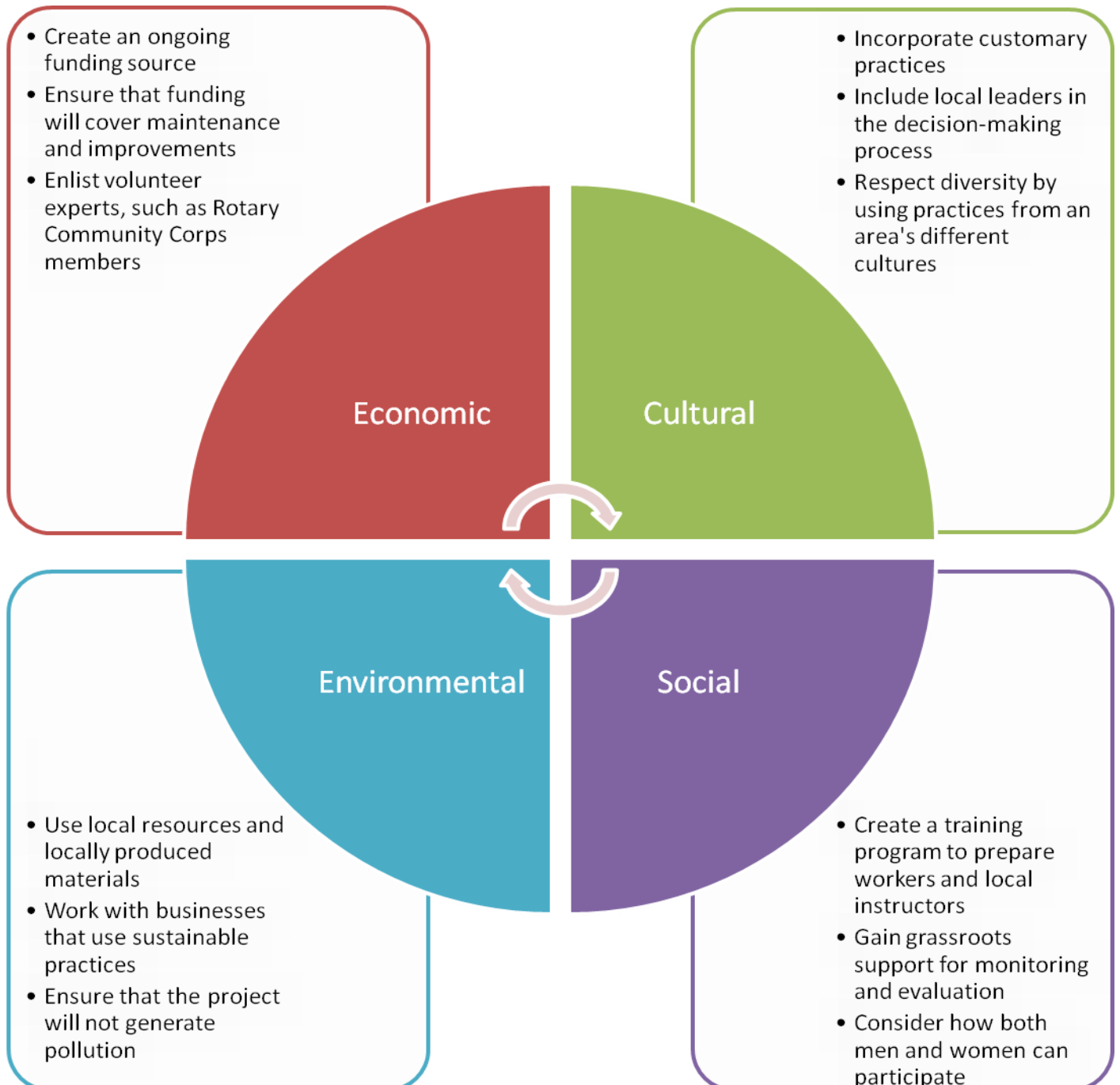
Insert TS-4: Areas of Focus Chart

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



Insert TS-5: 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]



















Club Communication



I can serve by leading and promoting effective communications to my club's internal and external audiences

| Session Goals | Materials |
|--|---|
| <p>Understand the elements of effective communication</p> <p>Apply effective communications to Rotary leadership</p> | <ul style="list-style-type: none">   <u>Insert CC-1</u>: Sample Biography of District Governor   <u>Insert CC-2</u>: 10 Tips for Public Speaking   <u>Insert CC-3</u>: Four Fundamental Skills for Speech Organization   Communication Skills, (Page 3) Excerpted from Leadership Development: Your Guide to Starting A Program. 250-EN-(308)   Effective Public Relations 257-EN-(707)   10 Biggest Public Speaking Mistakes   The 10 Commandments of Communication <p><u>Key:</u>  attached insert  online  article  ppt</p> |

This is a course in the Leadership Spiral going across 3 days of RLI. Prior courses include Insights Into Leadership. Other courses in this session include Strategic Planning & Analysis and 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) What opportunities exist for a leader or any member of a Rotary club to communicate with other some, most or all of the other club members?

- 2) What barriers or problems exist to effective communication to your club?

- 3) How would you organize and develop a good speech, report, or introduction at a club meeting? *See Insert CC-3, Four Fundamental Skills for Speech Organization for ideas.*



- 4) What does a target audience want to hear from a communicator at:
 - a) a graduation;
 - b) A toast at a wedding;
 - c) A shareholders' meeting;
 - d) The presentation of an award?

- 5) When is a written or oral communication too long? Is a very short communication sometimes effective?

- 6) What are the benefits and detriments of using visual demonstrations during a presentation?

- 7) What do you remember about speeches, reports and introductions in your club? Is humor appropriate?

“Rotary’s greatest strength will always be the individual Rotarian. No other organization has such powerful human resources.”

Past RI President Glen W. Kinross
— *President’s Message*
THE ROTARIAN, July 1997

There is no substitute for speaking before your fellow Rotarians. Several exercises are available in this session that can allow you this opportunity.

Exercise 1. Divide the class into small groups of 3-4. Review the sample biography of a district governor that is intended for introductions. Critique the sample, and if time, create a sample biography based on someone you know.

Exercise 2. Divide the class into groups of 2 (pairs). Have Rotarians interview each other for 5 minutes each. Then, have them each take 2 minutes and introduce each other. Faculty should try to pace the session so that everyone has a chance to give an introduction.



Insert CC-1: Sample Biography of District Governor

Joe Rotarian is the District Governor of District 4999. He is an insurance consultant with the firm of Mountjoy and Lufkin of Council Bluffs, Iowa. He was born in Omaha, Nebraska and went to public schools there until the family moved to Lincoln, Nebraska. He was a member of his high school football team, playing as an offensive tackle. Unfortunately, his team lost the Conference tournament in his senior year of high school. He then went on to Mullville Community College where he earned an associate degree in psychology and then completed his education at Phillips Seminary, also in Mullville.

After spending two years in the U.S. Army, Joe worked as a road crew supervisor for Mullville Construction Company for eight months and then supervised a shift at the Ford Motor Company plant in Wobegon, Michigan. Unfortunately he was laid off during a slowdown at the company. He then got a job as an insurance salesman and now is an insurance consultant for various businesses.

Joe joined Rotary in 1999 and quickly became the 50/50 committee chair. After holding other important club positions, he became club president in 2002. At the district level, Joe was District Chaplain, District Sgt. at Arms and Assistant Governor. He was nominated for Governor in 2009 and attended the Rotary International Assembly in California.

He is married to Melissa Rotarian and has three children—Joe, Jr. who is in the 4th grade in the Washington School, Annemarie, who is married and lives in Des Moines, Iowa and Martin who is at home. The family lives at 549 Mulberry Street in Council Bluffs and he can be reached by email at joe@yahoo.com



Insert CC-2: 10 Tips for Public Speaking

Feeling some nervousness before giving a speech is natural and even beneficial, but too much nervousness can be detrimental.

Here are some proven tips on how to control your butterflies & give better presentations:

1. **Know your material.** Pick a topic you are interested in. Know more about it than you include in your speech. Use humor, personal stories and conversational language – that way you won't easily forget what to say.
2. **Practice. Practice. Practice!** Rehearse out loud with all equipment you plan on using. Revise as necessary. Work to control filler words; Practice, pause and breathe. Practice with a timer and allow time for the unexpected.
3. **Know the audience.** Greet some of the audience members as they arrive. It's easier to speak to a group of friends than to strangers.
4. **Know the room.** Arrive early, walk around the speaking area and practice using the microphone and any visual aids.
5. **Relax.** Begin by addressing the audience. It buys you time and calms your nerves. Pause, smile and count to three before saying anything. ("One one-thousand, two one-thousand, three one-thousand. Pause. Begin.") Transform nervous energy into enthusiasm.
6. **Visualize yourself giving your speech.** Imagine yourself speaking, your voice loud, clear and confident. Visualize the audience clapping – it will boost your confidence.
7. **Realize that people want you to succeed.** Audiences want you to be interesting, stimulating, informative and entertaining. They're rooting for you.
8. **Don't apologize** for any nervousness or problem – the audience probably never noticed it.
9. **Concentrate on the message – not the medium.** Focus your attention away from your own anxieties and concentrate on your message and your audience.
10. **Gain experience.** Mainly, your speech should represent *you* — as an authority and as a person. Experience builds confidence, which is the key to effective speaking. A Toastmasters club can provide the experience you need in a safe and friendly environment.

Free resource from www.Toastmaster's.com



Insert CC-3: Four Fundamental Skills for Speech Organization



1. **Use an outline** which aids understanding.
 2. **Transition smoothly** from one point to the next.
 3. Craft an effective **speech opening**.
 4. Craft an effective **speech conclusion**.
- These are fundamental skills that you apply to every speech you'll ever deliver, whether it is a 2 minute off-the-cuff speech, a 15 minute business proposal, or a 60 minute keynote.

Outline. Numerous methods, including:

- Organizing by Who, What, When, Where, Why questions
- The Classic “Three Supporting Points”
- Chronological
- Geographical

Transitions. Transitions are the Key.

- Of the four skills, appropriate **transitions are most lacking in the majority of presentations**. Most speakers have an introduction and conclusion, with supporting material arranged in some form of outline. But, there is often little in the way of transition phrases that link the speech together in a cohesive unit.
- In a **written piece** (like this article), headings, bullets, and punctuation provide cues to the reader that help them understand the macro-organization.
- In a **verbal speech**, use pauses and transition phrases to achieve this effect so that the audience knows when one point ends, and the next begins.

Opening.

- State your premise.
- Road map to where you are going
- Open with a surprise

Conclusion.

- Summary of 3 main points
- Call-to-action













Concepts from *Toastmasters Speech 2: Organize Your Speech* by Andrew Dlugan, April 29th, 2008 at www.Toastmasters.com.



Team Building

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



| <i>Session Goals</i> | <i>Materials</i> |
|---|---|
| Explore How Committees and Team Building are used in Rotary Clubs |   <u>Insert_TB-1</u> : Club Committee Structures |
| Discuss the Advantages and Disadvantages of Committees |   <u>Insert_TB-2</u> : Club Coat of Arms Exercise |
| Examine Committees as a Tool of Leadership |   Club President Manual 222-EN (910) |
| |   Club Leadership Plan 245-EN (111) |
| | Key:  attached insert  online  article  ppt |

This is a course in the Leadership Spiral going across 3 days of RLI. Prior courses include Insights Into Leadership. Other courses in this session include Strategic Planning & Analysis and Club Communication. 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 should we use team building and committees in a Rotary club?

Are there advantages and disadvantages to different approaches? *Use flip chart. For resources use Club Committee Structures, Insert TB-1.*

- 2) How can we make effective use of Rotarian teams and committees? *Examples: Appoint the right people, define the committee mission, determine the ideal size for the committee.*

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

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



How important is delegation of tasks and duties? *Are these the same thing?*

- 3) In the committee, what is the role of the Committee Chair? *Setting the schedule, building team spirit, motivating the committee, appropriate delegation.*

the Club President? *Define initial mission, follow-up and deadlines, be available as a resource, do not micro-manage.*

the Secretary? *Query: Is this the club secretary or the committee secretary? If committee secretary, then keep an accurate account of the committee's deliberations.*

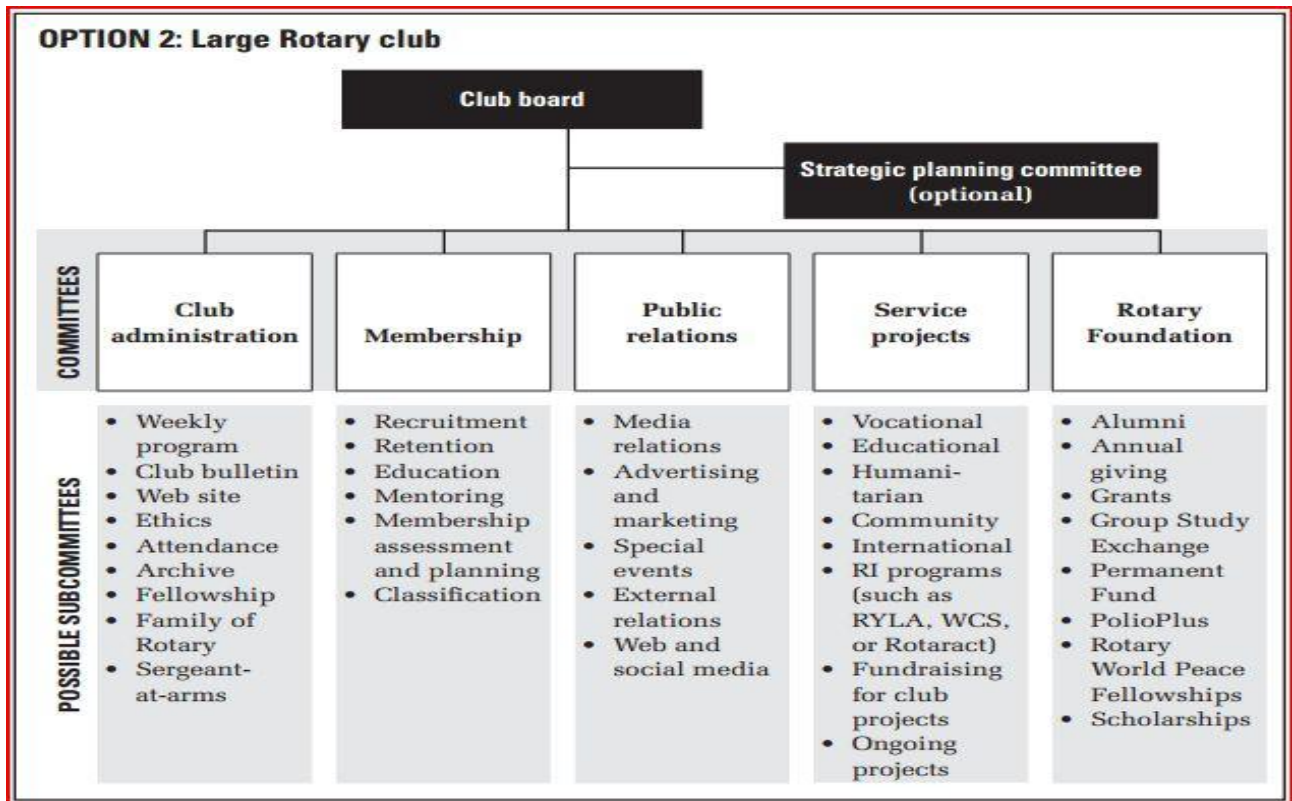
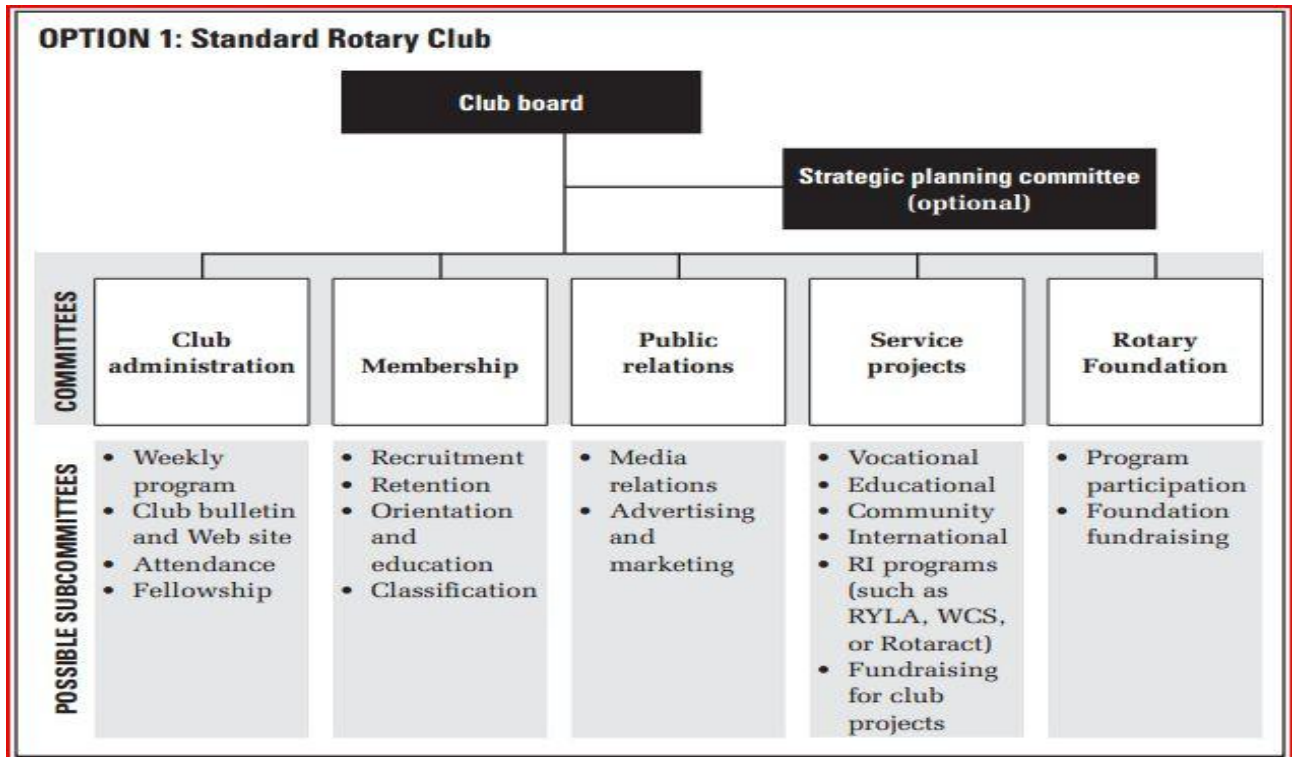
- 4) Club Coat of Arms Exercise (Insert TB-2) *Faculty should bring colored markers or crayons for at least 3 groups. Complete the Insert TB-2 Exercise as set forth in the materials, and then facilitate the following questions among the groups.*

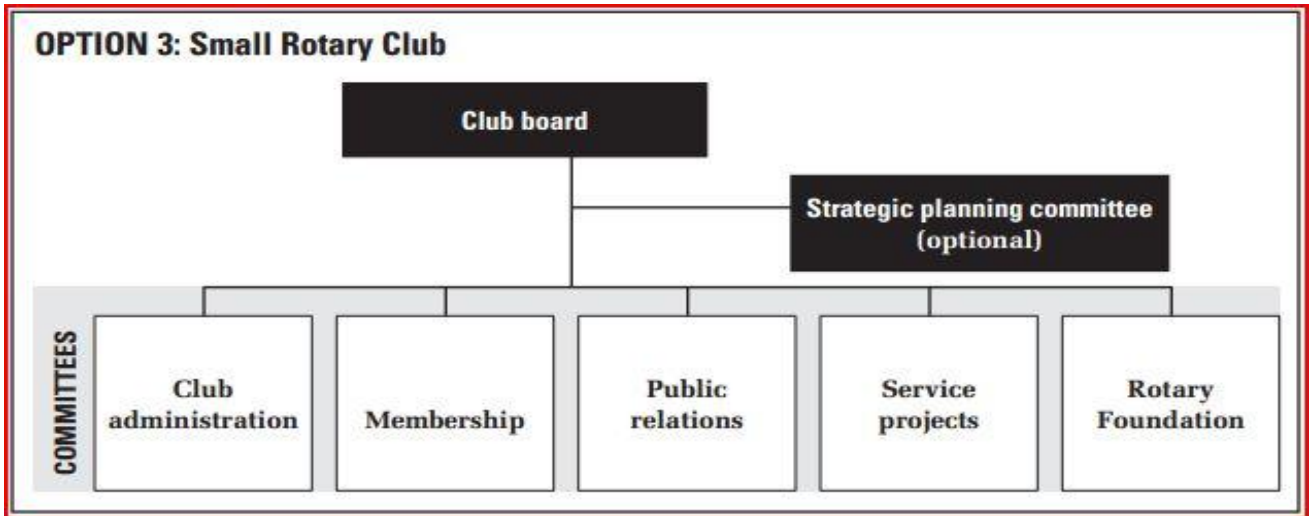
- a. *How was the team leader chosen?*
- b. *Was a team leader necessary?*
- c. *How were the different symbols, colors and designed agreed upon?*
- d. *What special talents did any team member have that helped the process?*
- e. *What methods were used to resolve conflicts?*
- f. *How collaborative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



Insert TB-1: Club Committee Structures

(from Club President’s Manual, Appendix A, 2 Pages)



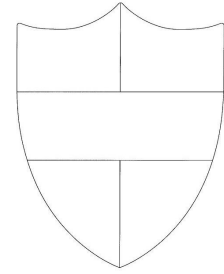




Insert TB-1: Club Coat of Arms Exercise

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

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



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

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

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

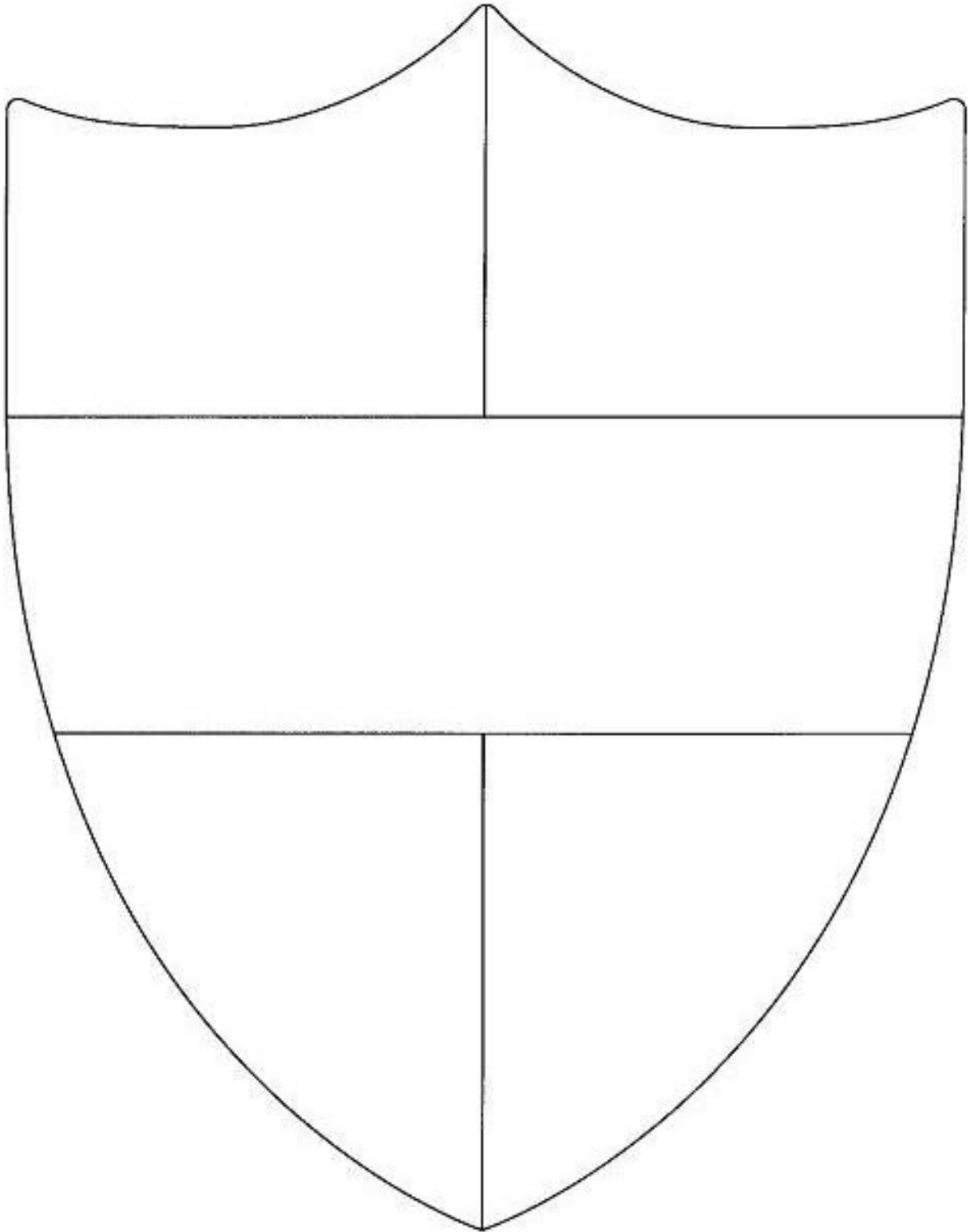
The goal is to design, develop and explain a Rotary coat of arms and heraldry. The students are not limited to using the enclosed blank shield and may design a coat of arms in whatever manner they wish. However, all items, symbols, colors or designs must be explained and relevant to Rotary, their clubs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

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

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



Club Coat of Arms





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 |
| <p>Identify My Club's Target Audience and Profile</p> <p>Define the Attributes of the Target Audience</p> <p>Explore How My Club Can Attract the Target Audience</p> | <ul style="list-style-type: none"> <u>Insert AM-1: Club Profile Sheet</u> <u>Insert AM-2: Interconnecting Relationships</u> <u>Insert AM-3: The Membership Process Chart</u> <u>Insert AM-4: The Club Membership Committee</u> Membership Development Resource Guide. 417-EN-(408) How to Propose a New Member. 254-EN-(709) <p>Key: attached insert online article ppt</p> |

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

Session Topics

1) What is a “target audience”? *In marketing and advertising, a “target audience” is a specific group of people within the target market at which a product or marketing message of a product is aimed. Philip Kotler, Marketing Management (2000). A target audience can be formed of people of a certain age group, gender, marital status, etc., e.g. teenagers, females, single people, etc. A combination of factors, e.g. women aged 20–30 is a common target audience. Other groups, although not the main focus, may also be interested. Discovering the appropriate target market(s) and determining the target audience is one of the most important activities in marketing management. Too broad of a target audience, or none at all, can result in trying to reach everybody and ending up appealing to no one.*

“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*



Does your Rotary club have a “target audience”? *This question may call up many responses. A Rotary club’s target market is the group of business and professional persons and community leaders in a geographic area having discretionary time and resources. In other words, a club’s target audience is their current and future members, as that is the group that it must have to survive. Participants might say that the beneficiaries of our good works are our target audience, but have the group inquire further. Why is this NOT true? Rotarians and future Rotarians of the club receive the benefits of membership that include fellowship, networking, and the personal fulfillment of doing good for others and helping your local and global community. Service to others is one attribute of an effective Rotary club’s mission. Reference may be made to Insert AM-2, Interconnecting Relationships as a prompt for discussion. Faculty should review and be familiar with it to aid with discussion. Rotarians may differ on the application of this marketing principal to Rotary clubs, but that can help advance the discussion.*

- 2) Who should be invited to be a member of your Rotary club? Why? *This question requires that the nature of the Rotarian’s own club be examined. A helpful tool is the simple, non-scientific Club Profile Sheet, Insert AM-1. By completing the Club Profile Sheet, a picture will emerge of the target audience for that club. It may be discussed whether other questions would be appropriately added to the Club Profile Sheet, and that can be discussed and encouraged. Insert AM-3 deals with the recommended Rotary club recruitment process.*

- 3) What about your club would be attractive to that “target audience”? *Relate the club attributes to the type person being sought, as developed above. Parallels may be drawn between the participant’s business or marketing experience and their experience in their Rotary club; or between a profile developed of a criminal by law enforcement authorities as reflected on popular crime investigation television shows.*

- 4) Name one thing can I suggest to my club that it can do to attract its “target audience”? *You can build on strengths shown in the profile, or try to remedy weaknesses. Refer to Rotary “best practices” where possible. Have each participant come up with one concrete, accomplishable thing to increase the attractiveness of their club to its target audience. Challenge the participant to create change in their Rotary club.*



You can reinforce this by having them write it at the top of the section heading, or create a “buddy” or partner within the group who will check on the progress of the goal within an agreed time frame.

- 5) How can a club membership committee recruit new members? What should it do?
Breakout the class into small groups to discuss ideas for the membership committee to recruit new members. Have each group report for class discussion. Refer to Insert AM-4 for the committee roles, responsibilities and key issues.



Insert AM-1: Club Profile Sheet

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



Insert AM-2: Interconnecting Relationships

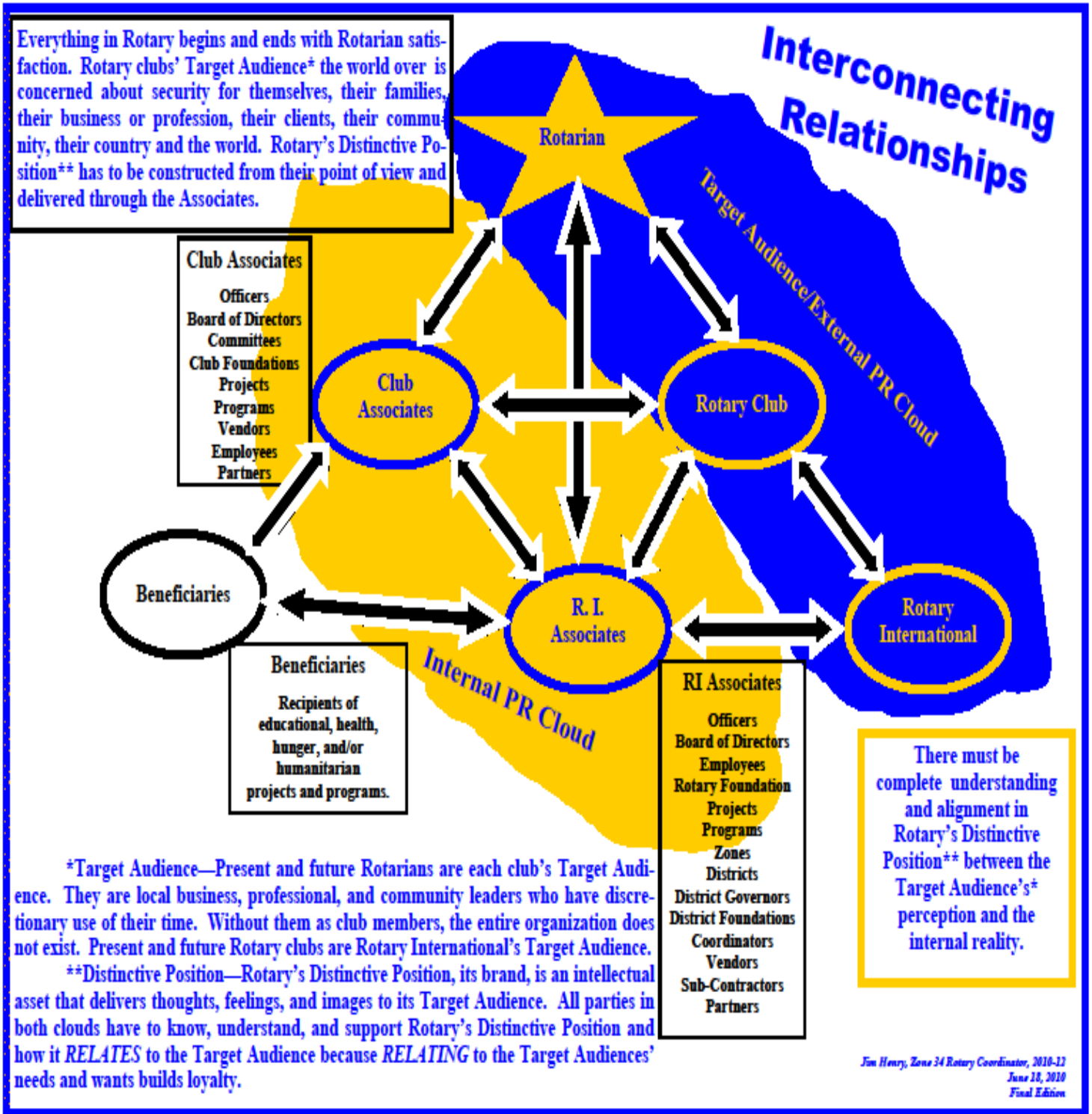
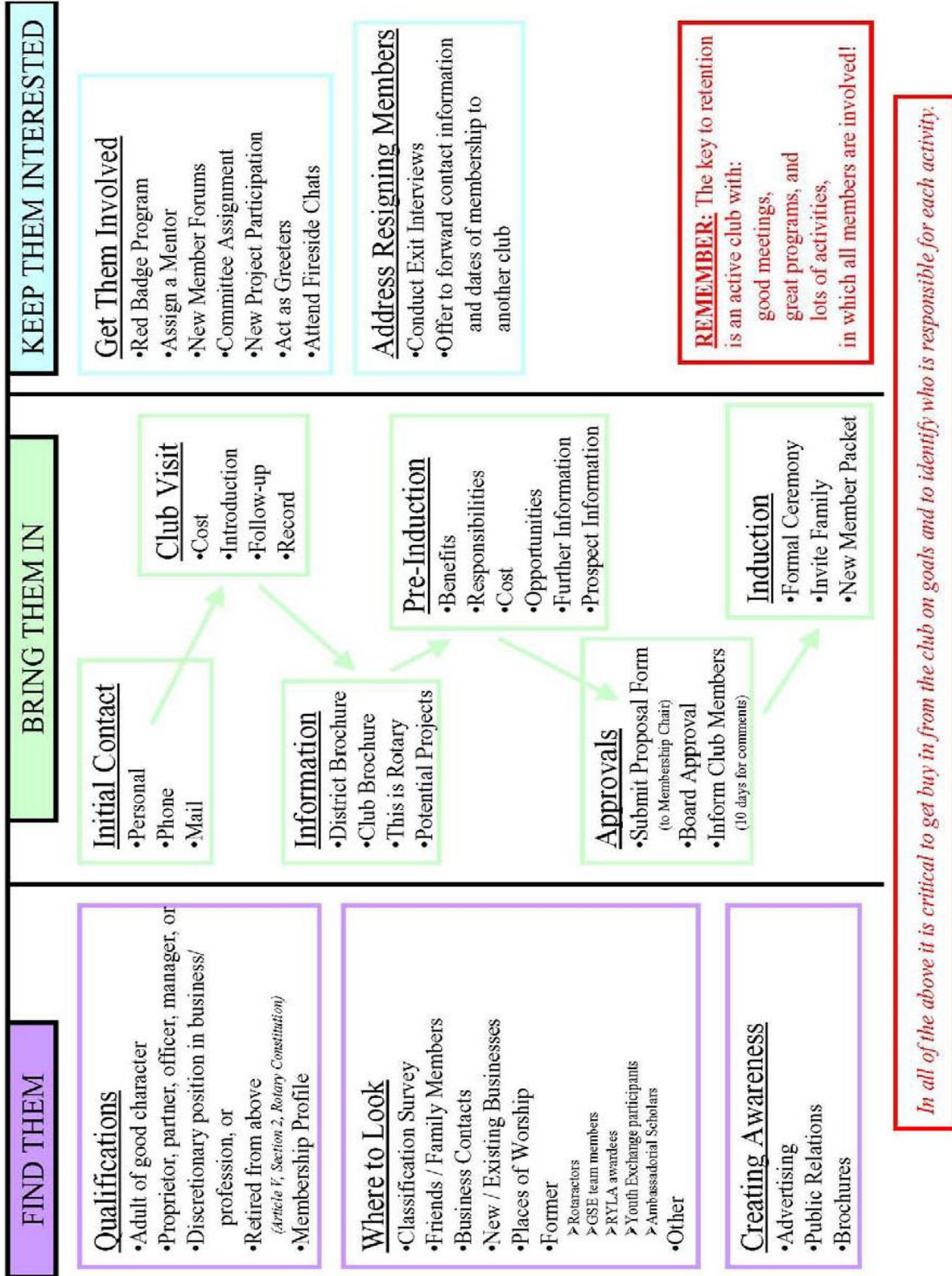


Diagram credit PDG Jim Henry, Zone 34 Rotary Coordinator, 2010-11 and the Zone 34 Team



Insert AM-3: Membership Process Chart

THE MEMBERSHIP PROCESS





Insert AM-4: The Club Membership Committee

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

The responsibilities of the club membership committee summarized below are explained further in The Club Membership Committee Manual, 226B-EN (709), downloadable at www.Rotary.org. The boxed material is taken from Club Membership section of The Planning Guide for Effective Rotary Clubs.

- Develop committee goals to achieve club membership goals for the coming year.
- Conduct club assessments to determine strengths and weaknesses.
- Work with the public relations committee to create a positive club image that is attractive to prospective and current members alike.
- Develop programs to educate and train new and current club members.
- Sponsor newly organized clubs in your district, if applicable.

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

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

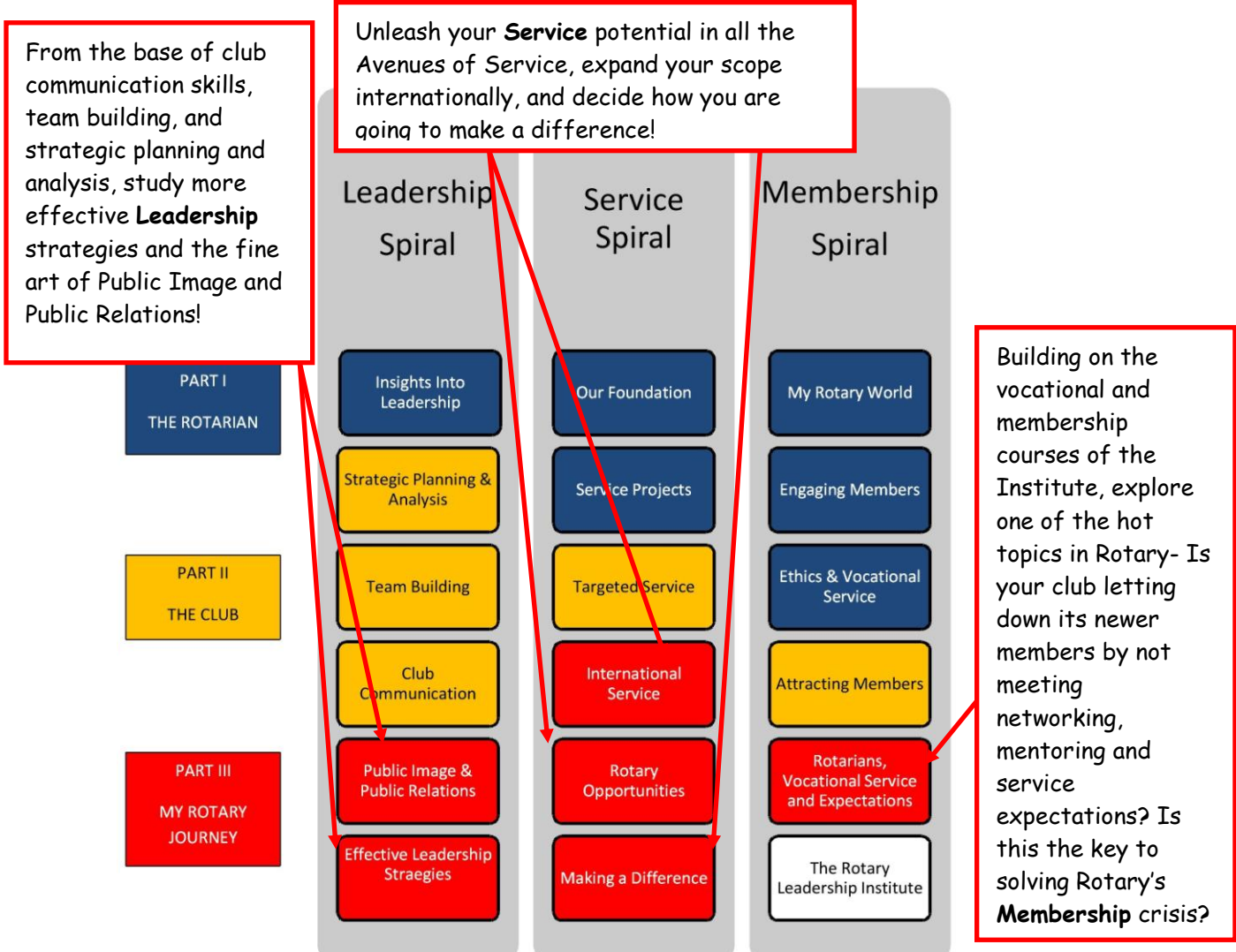
- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have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

Action steps:



Coming Attractions- Previewing RLI Part III

Part I centered on the basics of being a Rotarian and Part II applied that knowledge and skills attained to increase club effectiveness. Part III opens the door to higher Rotary service and critical examination of more complex issues!



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