



A Joint Project of over 350 Rotary Districts worldwide

2015-18

FACULTY—PART I

About Your RLI Program. The Rotary Leadership Institute (RLI) is a multi-district, grassroots leadership development program of member districts organized into regional divisions throughout the world. It was recommended by the R.I. Board of Directors and strongly endorsed by the Council on Legislation at three of their triennial meetings. RLI conducts a series of quality leadership development courses for potential club officers and all other club members, including those who have recently joined a Rotary Club. The courses emphasize both leadership skills and knowledge of Rotary around the world. All course sessions are completely interactive. RLI believes that leadership education has a positive impact on membership retention by creating enthusiasm and furthering engagement for Rotary. For more information on RLI, see our web site 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 web site 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.

2015-2018 RLI Curriculum Committee

Editor: Ed King, RLI

RLI Part I – THE ROTARIAN

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

RLI is a recommended program of Rotary International but 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.

Material in bold is for Faculty use and is not included in Participant guides.

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 www.rlifiles.com.



Insights Into Leadership

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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?



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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?



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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.



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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!



Engaging Members

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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!



Creating Service Projects

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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.

Course Evaluation

Handout

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
http://rlifiles.com/files/resource/Volunteer_v_Work_slides.pdf

● □ The Basics for Effective Leadership Are Really Pretty Basic
http://rlifiles.com/files/resource/Basics_of_Leadership_1.pdf

● □ 12 Leadership Essentials for the 21st Century
http://rlifiles.com/files/resource/12_Leadership_Essentials.pdf

Key: ◆ attached insert ● online □ article ■ ppt

All session materials are also available at www.rlifiles.com

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? *Consider flip chart for this question and the next.*
- 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;
 - **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;

- 4) Are good leaders born or can leadership be taught?
YES. RLI believes that while there are certain innate qualities a person brings to leadership, that leadership can be taught in the sense that a person can improve his/her leadership skills. People do differ on this question and all views may have merit.
- 5) What motivates someone to excel in the workplace?
- 6) What motivates someone to excel in your 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?
A vision without a plan is just a dream. Vision is more than seeing– it is determining the potential/ possibilities of something, e.g. an effective service project. A visionary sees where he/she wants to go.

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



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

Session Goals	Materials
Discuss the Purpose of Rotary	◆ MRW-1: My Rotary World Organizational Chart
Understand the Organization Structure	◆ □ MRW-2: RI Strategic Plan
Describe how the structure helps me as a Rotarian	◆ □ MRW-3: The Object of Rotary
	● □ Connect For Good https://www.rotary.org/myrotary/en/document/connect-good
	● □ History of Rotary International http://rlifiles.com/files/resource/History_of_RI.pdf
	● Contact RI Staff http://rlifiles.com/files/resource/2009_06_Contact_RI_Staff.pdf
Key: ◆ attached insert ● online □ article ■ ppt	

Session Topics

Your Club

- 1) Why did you join your Rotary Club?
- 2) What benefits have you gained from your Rotary Club?
- 3) Has anyone ever asked you what Rotary is all about? What do you tell them?
- 4) What are the Five Avenues of Service?
Club Service, Vocational Service, Community Service, International Service, and Youth Service. Share and define. Discuss the next items briefly.
- 5) What is our mission—what is Rotary?
Refer to Insert MRW-5 and have students read each part.

The Rotary District

- 1) Why do we have Districts?
- 2) What does the District Governor do... Assistant Governor ?
- 3) Why is the District important to the club?
- 4) How would a Club learn about and contact the district?

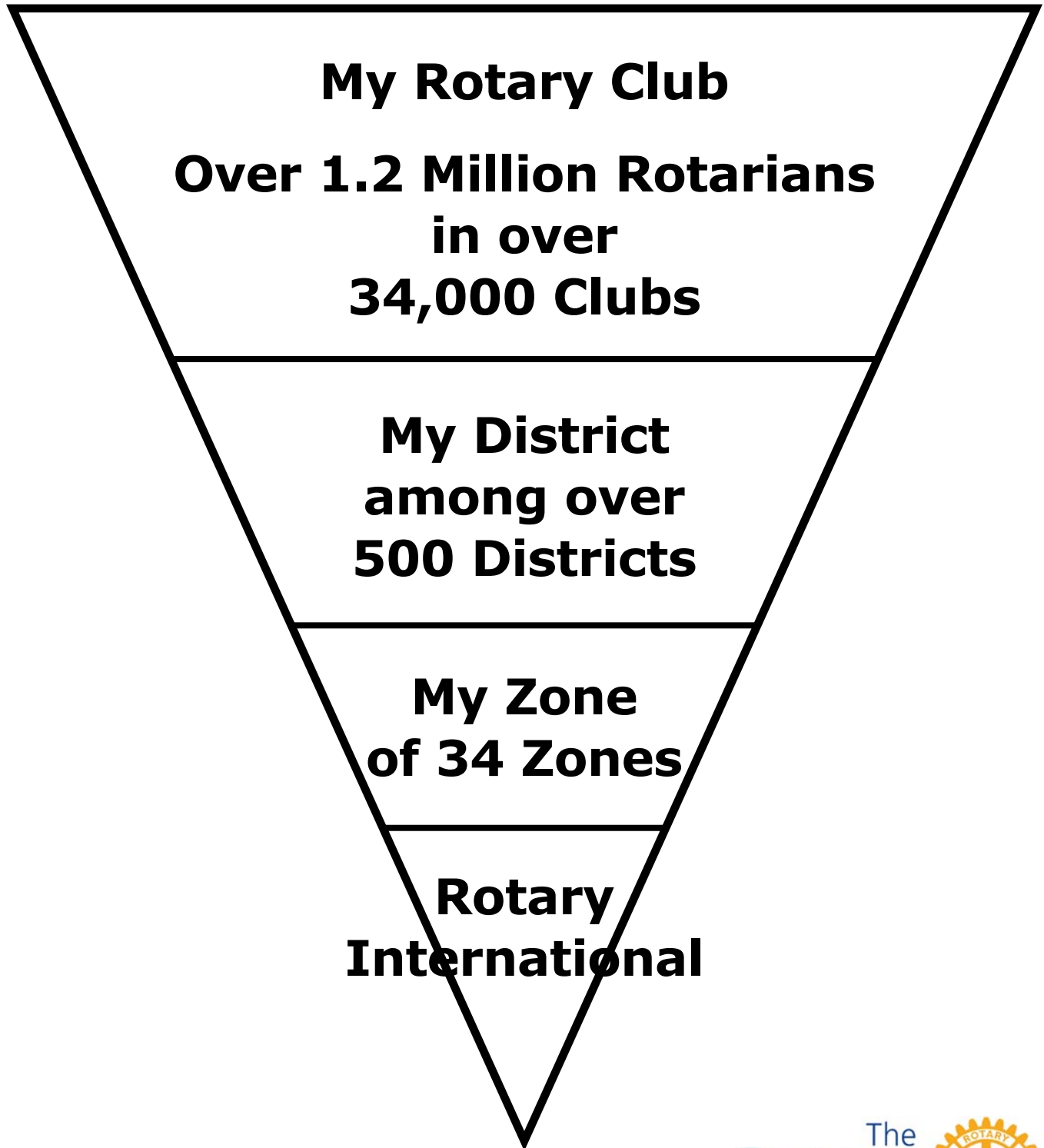
The Rotary Zone

- 1) What is a Zone and why do we have them? *It is an administrative function of R.I.*
- 2) What is the role of : the RI Director, Rotary Coordinator, Regional Rotary Foundation Coordinator and Rotary Public Image Coordinator?
- 3) Is the Zone important to the club? Why or why not?

Rotary International (R.I.)

- 1) 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?
- 2) Are there any advantages in being an international organization?
- 3) 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?
- 4) How do we contact R.I.? Where can we get information and help?
 - The Rotary International Web Site **www.rotary.org**
 - The Rotary Foundation Contact Center in your geographic area.
 - Zone Web sites
 - RLI - Rotary Leadership Institute Web Sites, including RLI International (Umbrella Organization) at **www.rotaryleadershipinstitute.org** and RLI Division sites listed at that site or provided by your discussion leader.
 - District web sites—links on both Zone web site and R.I. web site, use format **www.rotaryxxxx.org** where the xxxx is the 4 digit District Number

Insert MRW-1: My Rotary World



Insert MRW-2: Rotary International Strategic Plan

Rotary's strategic plan provides the framework for our future, ensuring that we continue to be known as a respected, dynamic organization that advances communities worldwide.

The strategic plan evolves with the aspirations of Rotarians. It is shaped by regular input from members through surveys, focus groups, committees, and meetings, so it can continue to help us achieve our goals.

OUR STRATEGIC PRIORITIES AND GOALS



Insert MRW-2, cont'd.

Rotary International Strategic Plan Priorities and Goals

Rotary's strategic plan identifies three strategic priorities supported by 16 goals. They represent what Rotarians have asked to be done to ensure a strong and vibrant Rotary going into the future.

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 programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration 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-2, cont'd.

OUR MISSION

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

OUR CORE VALUES

Our values are an increasingly important component in strategic planning because they drive the intent and direction of the organization's leadership.

These core values are:

FELLOWSHIP AND GLOBAL UNDERSTANDING

We build lifelong relationships.

ETHICS AND INTEGRITY

We honor our commitments.

DIVERSITY


We connect diverse perspectives.

VOCATIONAL EXPERTISE, SERVICE, AND LEADERSHIP

We apply our leadership and expertise to solve social issues.

Insert MRW-3: The Object of Rotary

R O T A R Y

Rotary 

Object of Rotary

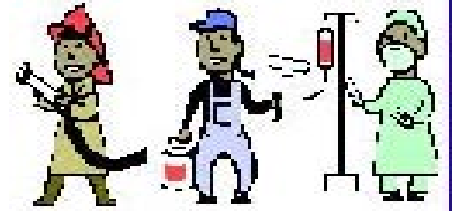
The object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

- 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.

Ethics and Vocational Service



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

Session Goals	Inserts & Online Materials
How should the Guiding Principles of Rotary strengthen me in my vocation?	◆ □ Insert EVS-1: The Guiding Principles of Rotary
How can Rotarians promote the 4-Way Test in their community and professional life, in all stages of life?	◆ □ Insert EVS-2: Vocational Service Ideas
How can I promote Rotary and Rotary ideals within my vocation?	● □ Article: The Four Way Test Means Business http://rlifiles.com/files/resource/Four_Way_Test_Means_Business.pdf
How do I make my vocation useful to Rotary?	● □ Applying the 4 Way Test. http://rlifiles.com/files/resource/Applying_the_Four_Way_Test.pdf
	● Organizing a 4 Way Test Essay. http://www.4waytest.org
	● □ Vocational Service Month http://rlifiles.com/files/resource/voc_serv_month.pdf
	● □ Rotary Volunteer Handbook. http://rlifiles.com/files/resource/Rotary_Vol_Handbook_263en.pdf
	● ■ E-Learn Vocational Service http://rlifiles.com/files/resource/elearn_voc_service.ppt
Key: ◆ attached insert ● online □ article ■ ppt	

Session Topics

1) What is a classification in Rotary? *A classification is defined in the Standard Rotary Club Constitution, Article 8. Each member shall be classified in accordance with the member’s business, profession, or type of community service. The classification shall be that which describes the principal and recognized activity of the firm, company, or institution with which the member is connected or that which describes the member’s principal and recognized business or professional activity or that which describes the nature of the member’s community service activity.*

Give examples of classifications? Discuss why everyone in Rotary has a classification.
A classification is required of each active member.

How does having a classification relate to “vocational service”? *The classification principle — the guideline by which nearly all Rotary membership is determined — ensures that each club’s membership represents a cross-section of its community’s business and professional population. Classification and vocational service go hand in hand. Just as a Rotarians represent their vocation in Rotary, so too do they represent Rotary in their vocations.*

- 2) What is “vocational service”? What is my vocational service “responsibility” as a Rotarian? *Vocational Service, the second Avenue of Service, has the purpose of promoting high ethical standards in businesses and professions, recognizing the worthiness of all dignified occupations, and fostering the ideal of service in the pursuit of all vocations. The role of members includes conducting themselves and their businesses in accordance with Rotary’s principles.*

"Working to find peace in the world is a family problem. It is not too big a problem to deal with if we realize that we are all from the same family."

*1982-83 RI Pres. Hiroji Mukasa
— Building Bridges of Friendship in
the Community
THE ROTARIAN, August 1982*

How is it stated in the Second Object of Rotary? *(See Insert EVS-1)*
Facilitator note; write out the second object of Rotary on easel, or put into PPT. And break it down into three parts.

- 3) Give examples of “high ethical standards”? How can I promote them in my workplace and community? **By setting a positive example, praising and encouraging ethical behavior, establishing and discussing policies that promote honesty, fairness, accountability and respect, demonstrating high personal standards with customers, vendors and business associates. Ethical business practices depend on (1) honest language, (2) insisting on proper behavior, and (3) refusing to allow gray areas. (Forbes magazine 2009).**
- 4) What does it mean by recognizing useful occupations? How do we do this as individuals or in our clubs?
How: (1) Make classification talks and tours of members’ businesses a standard component, of your club’s program, (2) Join or form a Rotary Fellowship related to your vocation. Rotary Fellowships are international associations of Rotarians, Rotarian spouses, and Rotaractors who join together to pursue a shared recreational or vocational interest., (3) Sponsor a career day for Rotarians to bring young people to their places of business to educate them about career opportunities.
- 5) How can I promote Rotary’s commitment to high ethical standards 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? **By: (1) Displaying The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or work space and use it as a conversation starter to tell your colleagues about Rotary’s commitment to business ethics and personal integrity, (2) “Walk the talk” by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards, (3) Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.**
- 6) What is “social responsibility” and why is it important? **Social Responsibility is the theory that either a individual or corporate entity has an obligation to act to benefit society at large. What is my role in advancing “social responsibility” within my community, and particularly with our youth? Discuss passive and active instances of social responsibility. Discuss acting individually and corporately (Examples: through work, religious, government or community organizations). Discuss forced (legal) versus private examples.**

"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*

- 7) How do Rotary’s Guiding Principles (Insert EVS-1) relate to me? ***They are all primarily geared toward individual action and thought.***

The “Four Way Test”? The Object of Rotary? The Rotary Code of Conduct? The “Five Avenues of Service”?
Review each document either as pairs, small groups, etc., and report back to the group.

- 8) What is the obligation of Rotary Clubs to educate about Ethics: to Rotarians?, to their community? to their schools? to local businesses? ***The club and its members share responsibility for promoting vocational service. Each club should develop projects that allow members to use their business and professional skills. Members are expected to contribute to these projects and to conduct their own business dealings in accordance with Rotary principles.***
- 9) 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”?
- 10) How can you encourage your club to be more involved in vocational service activities?
Lead & have passion. Involve youth.
What are some easy vocational project ideas that you can take back to your club? ***See Insert EVS-2.***

Insert EVS-1: Guiding Principles of Rotary

<h3 style="margin-top: 0;">The Object of Rotary</h3> <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>FIRST. The development of acquaintance as an opportunity for service;</p> <p>SECOND. 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>THIRD. The application of the ideal of service in each Rotarian’s personal, business, and community life;</p> <p>FOURTH. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.</p>	<h3 style="margin-top: 0;">The Five Avenues of Service</h3> <p>Based on the Object of Rotary, Rotary’s Philosophical cornerstone and foundation of club’ activity:</p> <p>Club Service focuses on strengthening fellowship and ensuring the effective functioning of the club.</p> <p>Vocational Service encourages Rotarians to serve others through their vocations and to practice high ethical standards.</p> <p>Community Service covers the projects and activities the club undertakes to improve life in its community.</p> <p>International Service encompasses actions taken to expand Rotary’s humanitarian reach around the globe and to promote world understanding and peace.</p> <p>Youth Service recognizes the positive change by youth & young adults via leadership and involvement.</p>
<h3 style="margin-top: 0;">The Four-Way Test</h3> <p>From the earliest days of the organization, Rotarians were concerned with promoting high ethical standards in their professional lives. One of the world’s most widely printed and quoted statements of business ethics is The Four-Way Test, which was created in 1932 by Rotarian Herbert J. Taylor (who later served as RI president) when he was asked to take charge of a company that was facing bankruptcy.</p> <p>This 24-word test for employees to follow in their business and professional lives became the guide for sales, production, advertising, and all relations with dealers and customers, and the survival of the company is credited to this simple philosophy. Adopted by Rotary in 1943, The Four-Way Test has been translated into more than a hundred languages and published in thousands of ways. It asks the following four questions:</p> <p>“Of the things we think, say or do:</p> <ol style="list-style-type: none"> 1. Is it the TRUTH? 2. Is it FAIR to all concerned? 3. Will it build GOODWILL and BETTER FRIENDSHIPS? 4. Will it be BENEFICIAL to all concerned?” 	<h3 style="margin-top: 0;">Rotary Code of Conduct</h3> <p><i>As a Rotarian, I will:</i></p> <ol style="list-style-type: none"> 1. Act with integrity and high ethical standards in my personal and professional life 2. Deal fairly with others and treat them and their occupations with respect 3. Use my professional skills through Rotary to mentor young people, help those with special needs, and improve people’s quality of life in my community and in the world 4. Avoid behavior that reflects adversely on Rotary or other Rotarians

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.

Foundation I: Our Foundation



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

Session Goals	Materials
<p>Understand the Basic Goals, Programs & Financing of our Rotary Foundation</p> <p>Discuss the Importance & Value of our Rotary Foundation to your Club</p> <p>Need for each Rotarian to make TRF their charity of choice</p>	<ul style="list-style-type: none"> ◆ □ OF-1: Rotary News 1A, 1B, 1C, 1D ◆ □ OF-2: Rotary Foundation Grants and Related Programs, from Rotary Foundation Reference Guide, 219-EN (1012), pages 8-12 ◆ □ OF-3: Foundation Facts—Giving <i>159-EN (1113)</i>, Graphics http://www.rotary.org/en/document/12436 ● □ Rotary Foundation Reference Guide <i>219-EN (1012)</i> http://www.rotary.org/en/document/518 ● □ Connect for Good (formerly Rotary Basics) https://www.rotary.org/myrotary/en/document/connect-good ● Doing Good in the World DVD http://vimeo.com/album/1872866
<p>Key: ◆ attached insert ● online □ article ■ ppt</p>	

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

Session Topics

- 1) Does anyone happen to know the definition of a foundation? *A “foundation” is defined by Webster’s Dictionary as “funds given for the permanent support of an institution”, for example an endowment or a trust. It is usually a separate legal entity.*

- 2) When you hear the word “foundation” do any foundations come to mind? *Foundations are generally classified as “private foundations” or “public charities”. The largest foundations in the world are public charities such as The Bill and Melinda Gates Foundation (healthcare, education, poverty, technology). They have partnered with TRF, Welcome Trust (research, science & medicine), Lilly Endowment (community development, education, religion), The Ford Foundation (community development, education, media, arts, peace).*

- 3) Why is the Rotary Foundation separate from RI? ***Specific “charitable purposes”, favorable tax status in many countries for givers and administration, contains different supervision and management structures than a standard business.***

- 4) What does the Rotary Foundation do? Take a quick look at the areas of focus insert OF-2. Does anyone see any benefit in having areas of focus? What is your opinion? ***Rotary operates programs like PolioPlus, Humanitarian Grants Programs, and Educational Programs. List 6 areas of focus - see insert OF-2.***

- 5) What are the benefits to Rotary, if any, to having a Rotary Foundation? ***Refer to Fourth Object of Rotary***

- 6) Let’s divide into groups to discuss any programs or projects that your club has participated in that were funded in whole or in part by the Rotary Foundation.
Divide attendees into groups of about four. Allow ___ minutes for the discussion and then ask groups to report about programs or projects.

- 7) Does anyone happen to know anything about the Rotary Peace Centers, VTTs, Scholarships or Polio Plus?

- 8) How can you and your club contribute to and raise funds for our Rotary Foundation? ***Donations can be made by individuals (check or direct withdrawal), clubs, districts, corporations, other foundations, non-governmental organizations, governments, or fundraising from the general public.***

- 9) What incentives does our Foundation offer to enhance giving? ***Recognitions for Rotarians, family and others, such as Paul Harris Fellow, Major Donor, Benefactor, Bequest Society; the use of points to creatively create recognitions; the ability to use cash or prior giving (DDF) donations to support projects; and district policies that bring back certain funds for local or community projects.***

SUMMARIZE:

- A. More details on the programs of our Foundation can be read about in Insert OF-2 and at Rotary.org.***
 - B. You can learn more about the Rotary Grant Model by attending RLI Part II in the session “Targeted Service” and learn more about district-related information at one of your district’s Grants Seminars.***
- 10) When you give money to our Rotary Foundation, can you designate where the funds go and for what purpose? ***Yes.*** What are the options and how do they work? ***Funds can be given to The Annual Fund (analogize to a checking account, spent annually), The Endowment Fund (analogize to a savings account, held as a traditional endowment where the interest-only is spent and the principal remains), or designated to funds supporting specific initiatives, such as Polio Eradication, Peace Scholars, or specific grants. See also OF-3: Foundation Facts – Giving.***

- 11) What is meant by “EREY”? *Every Rotarian, Every Year. It is a campaign to involve every Rotarian in the funding and activities of The Rotary Foundation at least one time per year. Rotary Foundation individual recognitions encourage giving by individuals at specific benchmarks, such as “EREY” for any amount annually, per Rotarian, per year, “Sustaining Member” or “Sustainer” at US\$100 per Rotarian, per year, and Paul Harris Society at US\$1000 per Rotarian, per year. Rotary Foundation club recognitions encourage giving by all individuals in a club, such as “100% EREY Club” recognizing all members of a club contributing some amount, and “100% Sustaining Member Club” at US\$100 per Rotarian, per year. District and Clubs often create their own recognitions and incentives to promote involvement. Faculty can use the chart below to emphasize particular types of giving and recognition, or to create an appropriate exercise.*

TRF Giving & Recognition	Annual Fund	Endowment Fund
“Every Rotarian, Every Year” or “EREY” recognizes clubs in which all members contribute to the Annual Fund each year	“Annual Fund” is TRF’s “checking account”, to be spent on programs in the 3 rd year	“Endowment Fund” is TRF’s “savings account”, formerly the “Permanent Fund”
“100% Sustaining Club” is when all club members attain sustaining member status	“Sustaining Member” or “Sustainer” recognizes a cumulative US \$100 gift each year to the Annual Fund	“Benefactor” recognizes a cumulative US \$1,000 gift or pledge to the Endowment Fund
“100% Paul Harris Fellow Club” is when all club members attain PHF status	“Paul Harris Fellow” or “PHF” recognizes a cumulative US \$1,000 gift to the Annual Fund	“Bequest Society” recognizes a cumulative US \$10,000 gift or pledge to the Endowment Fund
“Triple Crown Club” is when all club members attain Sustaining, PHF, and Benefactor status	“Paul Harris Society” recognizes a cumulative US \$1,000 gift each year to the Annual Fund	“Major Donor” recognizes a cumulative US \$10,000 gift to TRF
No portion of your Rotary dues are required to go to TRF. All contributions are voluntary.	“Polio Plus” are funds given to TRF for the eradication of polio worldwide	“Arch Klumph Society” recognizes a cumulative US \$250,000 gift to TRF

CONCLUSION OF SESSION

Faculty should select a few items, as time allows, to summarize.

- *Summarize that Goals of Session have been met and how: Discussed:*
 - *Basic Goal: Mission Statement of The Rotary Foundation*
 - *Programs*
 - *Financing*
 - *The Value of our Foundation to your club*
- *The Rotary Foundation is an amazing force for (as Founder Arch Klumph said) “doing good in the world”*
- *Through our Foundation and the power of our Rotarian network of business, professional and community leaders, we are accomplishing amazing things, changing lives, and shifting the paradigm on how to help other and improve our world.*
- *We looked at great projects originating in our own clubs.*
- *We looked at amazing global and regional project accomplishments in areas of Polio Eradication, Promoting World Peace, and improving the health and lives of people around the world. All these projects started as club projects.*
- *Our support in participation and funding is vital to those accomplishments, both now and in the future.*
- *Because of our support as Rotarians, we are part of every single project we have discussed, and thousands more that don’t have time to cover.*
- *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.*

Insert OF-1A: Rotary News:

Rotary and Partners “this close” to Eradicating Polio Worldwide

Kabul, Afghanistan – January 1, 2014

In 1985, after successfully eradicating polio in a project in the Philippines, Rotary launched its PolioPlus program to eradicate polio worldwide. Today, over a million Rotarians, joined by an impressive list of partners, are “this close” to eradicating polio in the world, seeing a 99% reduction in cases since the 1980s, fewer than 250 cases reported in 2012, and only 3 polio endemic countries left, conflict-ridden Afghanistan, Pakistan, and Nigeria. Over 2 billion children in 122 countries are now protected from polio. But, the risk of resurgence of the virus is real.



Polio survivors in Africa. Photo Credit: WHO/Rotary International

Poliomyelitis (polio) is a crippling and potentially fatal disease that still threatens children in parts of the world. The poliovirus invades the nervous system and can cause paralysis in a matter of hours. It can strike at any age but mainly affects children under five. Over 1,000 children per day were contracting polio in 1985. If polio is not completely eradicated from the earth, experts believe polio could rebound to 10 million cases in the next 40 years. The public health and global economic impact of these future polio cases is significant.

As for Rotarians, for more than a quarter century club members have donated their time and personal resources to end polio. Every year,

hundreds of Rotary members work side-by-side with health workers to vaccinate children in polio-affected countries. Rotarians work with partners like UNICEF to prepare and distribute mass communication tools to share the message with those isolated by conflict, geography, or poverty. Rotary members also recruit fellow volunteers, assist with transporting the vaccine, and provide other logistical support.

Rotary’s early successes brought on an impressive list of partners that are necessary to eliminate polio worldwide. The Global Polio Eradication Initiative, formed in 1988, is a public-private partnership including Rotary, the World Health Organization, the U.S. Centers for

Disease Control and Prevention, UNICEF, the Bill & Melinda Gates Foundation, and governments of the world. Rotary’s focus is advocacy, fundraising, volunteer recruitment and awareness-building. Fundraising led by Rotarians helps to provide much-needed operational support, medical personnel, laboratory equipment, and educational materials for health workers and parents. Rotary has contributed more than US\$1.2 billion and countless volunteer hours. In addition, Rotary’s advocacy efforts have played a role in decisions by donor governments and corporations to contribute over \$9 billion to the effort.

Rotarians vow not to quit the effort until all cases of polio are gone.

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

Insert OF-1B: Rotary News:

Rotary Peace Fellow Helps Build New Countries and Old

Brasilia, Brazil– September 10, 2013. Through her work for the UN Development Program Brazil, 2005-07 former Rotary Peace Fellow at Universidad del Salvador Izabela da Costa Pereira advises the Brazilian government on how best to support reconstruction and development projects in Haiti.

“I learn how to deal with the unexpected and how to overcome obstacles. What motivates me is that I help my country to help another nation in need,” she says. Previously, Pereira worked as a democratic governance officer with the UN Integrated Mission in Timor-Leste (UNMIT), monitoring the country’s institutions and helping them determine how to operate democratically to best serve their people.

Pereira’s experience as a Rotary Peace Fellow prepared her well for her career. During her fellowship, she served as an electoral observer with Organization of American States missions in Colombia and Nicaragua; explored conflict prevention strategies with the United Nations Development Fund for Women in Senegal; and served on a UN peace building mission for women in Côte d’Ivoire.

Each year, Rotary selects “Peace Fellows”, individuals from around the world to receive fully funded academic fellowships at one of the Rotary Peace Centers. These fellowships cover tuition and fees, room and board, round-trip transportation, and all internship and field study expenses.

1. Why Engage this Project?



Izabela da Costa Pereira with children outside a rural village in Timor-Leste where she is a Democratic governance officer with UN. Integrated Mission in Timor-Leste.

The program offers master’s degree fellowships at premier universities around the world in fields related to peace and conflict resolution and prevention. Programs last 15–24 months and require a practical internship of 2–3 months during the academic break. Each year up to 50 master’s fellowships are awarded.

Pereira states: “the Rotary Foundation has opened so many doors of opportunity. No doubt, all my experiences in Africa, South Asia, and Latin America are the results of the great experience I had as a Rotary Peace Fellow.”

In a recent interview with the global affairs magazine, *Diplomatic Courier*, she described her proudest personal contribution to foreign policy as “...having contributed to the nation building of one of the newest states of the 21st century... As a Democratic Governance Officer at Timor-Leste

2. Why Now?

UNMIT, I directly assisted on political issues related to democratic consolidation and institution strengthening... in strategic policies reforms, anti-corruption, gender, civil service, media, transparency, decentralization, elections, and sustainable socio-economic development. As a new sovereign nation-state, it is fundamental to guarantee its path towards a democratic governance culture that will assure peace, socio-economic development, and stability in a post-conflict scenario.

[B]esides my background in international relations, I could use on a daily basis my specialization on peace, conflict resolution, economy, and political affairs for an effective aid.”

Pereira said “the need for trained peace-makers has never been greater... more leaders are needed on the local, national and international arena, particularly young professionals”.

3. Why Rotary?

Insert OF-1C: Rotary News:

Rotary Targets First 24 Hours of Life in East Africa

*Kampala, Uganda –
November 1, 2013.*

The Rotary Foundation of Rotary International, a global humanitarian service organization, and Aga Khan University (AKU), a private, non-denominational university promoting human development through research, teaching and community service have formed a partnership to improve maternal and child health in East Africa. Under the partnership, the Rotary Foundation, the charitable arm of Rotary International, will provide grants to Rotary clubs to establish volunteer teams to support the professional development of nursing faculty at AKU's East Africa campuses in Kenya, Tanzania and Uganda.

According to the UN, developing countries account for 99% of the more than 350,000 women who die each year from complications during pregnancy or childbirth. In sub-Saharan Africa, 1 in 30 women is at risk, compared with 1 in 5,600 in developed countries. More than half of maternal deaths are caused by excessive bleeding (35%) and hypertension (18%). Developing countries also account for most of the 7.6 million children who die annually before age 5. Again, East Africa records the highest child mortality rates, with one in seven children dying before age five, and 141,000 annually in Uganda alone. A child's greatest risk of dying is during the first 28 days of life, accounting for 40% of all deaths among children under the age of 5.



Half of newborn deaths occur during the first 24 hours and 75% during the first week of life, with preterm birth, severe infections and asphyxia being the main causes.

In most East African countries there is little public health infrastructure and limited government funding. However, there are Rotary clubs in those countries. Many local Rotary club leaders have acknowledged the problem and want to help with funding, mentoring, personal advocacy and participation. Agha Khan University (AKU) has a campus and a hospital for women in Kampala, one of many it has in Africa and the Middle East. Their campus produces some doctors, but mostly nurses, midwives and health educators, many of whom already work in those roles

but themselves are poor, long out of school, and have limited career and life skills. AKU is poised to make an immediate difference in the public health landscape. Recently, AKU and the World Health Organization (WHO) published a study that makes recommendations on how to target scarce resources for maximum impact on the health of women and children and identifies 56 essential interventions, that when implemented in packages relative to local settings, are most likely to save lives. Some of the interventions include: managing maternal anemia with iron, preventing and managing post-partum hemorrhage, immediate thermal care for newborns, extra support for feeding small and preterm babies, and antibiotics for the treatment of pneumonia in children.

Photo: Doctor in Uganda. Credit: Rotary

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

Insert OF-1D: Rotary News:

Cambodia’s Children “Waste-Pickers” Receive Vital Services

Phnom Penh, Cambodia – February 12, 2014. Phnom Penh’s city landfill is at capacity. As in many developing countries,

“Waste-pickers” support themselves and their families by sorting garbage for saleable goods. Nearly half are children. They are highly visible as they push their handcarts around the city calling “Hychai”.

A local non-profit organization,

Community Sanitation and Recycling Organization or CSARO tries to address the needs of these waste-pickers. Through a variety of programs, CSARO helps adults improve their living and working conditions, while also providing educational outreach to the children.

CSARO is one of the many locally originating humanitarian projects worldwide that receive funding from The Global Fund for Children (GFC).

GFC was the vision of a Rotary Foundation Ambassadorial Scholar traveling in India in 1990, Scholar Maya Ajmera witnessed a group of children sitting in a circle at a train station, listening and answering questions while a teacher led them in simple learning exercises. She learned that the children lived, played, and begged on the train platforms. Seeking a pathway out of poverty, two teachers offered the children free education, clothing, and food. The school operated on only \$400 per year,



serving 40 students who had no other opportunity to learn.

Inspired by this powerful model, Maya founded GFC in 1993 based on the belief that small amounts of money, when given to innovative, community-based organizations, could make a lasting impact on the lives of the world’s most vulnerable children. By its 10th anniversary, GFC had launched additional services to help its grantees grow and thrive, including management support, technical assistance, and networking opportunities. GFC also attracts other funders to its grantees and increases grantees’ visibility to help them garner international recognition for their work. The result: a global community of strong grassroots organizations that are tackling some of the world’s biggest problems.

Now a university professor, Maya stepped down from her position as president of GFC in 2011, having grown her initial vision into a thriving global organization. To date, GFC has awarded more than \$25 million in grants to more than 500 organizations in 78 countries, touching the lives of over 7 million children worldwide.

Maya Ajmera received her Ambassadorial Scholarship from District 5240 in California, USA, to study at St. Xavier’s College in India. From 1947 to 2013, nearly 38,000 men and women from about 100 nations studied abroad as Ambassadorial Scholars. The purpose of the program was to further international understanding, peace and good will among the peoples of the world.

Photo Credit: CSARO/GFC

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

Insert OF-2: Areas of Focus

All projects, scholars, and vocational training teams funded by global grants work toward specific goals in one or more of the following areas of focus:

1. Peace and conflict prevention/resolution

2. Disease prevention and treatment

3. Water and sanitation



4. Maternal and child health



5. Basic education and literacy

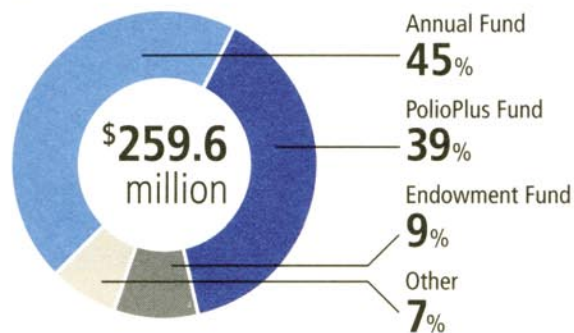
6. Economic and community development



Insert OF-3: Foundation Facts - Giving

Most recent data available at time of publishing, from Rotary Pub. 159-EN (1113)

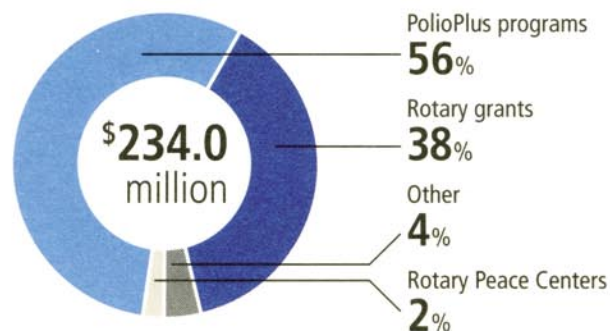
2013-14 TOTAL CONTRIBUTIONS*



Give

Do

2013-14 PROGRAM SPENDING



*Since 2008, contributions include grants for polio eradication from the Bill & Melinda Gates Foundation.

SUMMARY STATISTICS

	2013-14	Cumulative
Contributions	\$259.6 million	\$3.5 billion
Annual Fund	\$116.6 million	\$2.1 billion
Endowment Fund	\$23.7 million	\$255 million
PolioPlus Fund	\$100.3 million	\$1.1 billion
Other	\$19.0 million	\$69.6 million
Program Spending	\$231.5 million	Since 1947: \$3.2 billion
Arch Klumph Society Members	79	521
Major Donors	2,216	21,078
Bequest Society Members	639	10,663
Benefactors	2,388	92,577
Paul Harris Fellows	54,409	1,460,787
Paul Harris Society Members*	10,143	10,143

*Note: 2013-14 is the society's inaugural year.

Engaging Members



I make my club and Rotary stronger by my active participation

Session Goals

Explore the value and options of engaging our members.

Materials

- ◆ EM-1: Sample Membership Satisfaction Survey (RI)
- ◆ EM-2: Engagement Ideas: Delivering Value - Keeping Rotarians
- ◆ EM-3: 12 Point Plan for Membership Engagement
- Creating Your Membership Development Plan
<https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>
- Club Assessment Tools *EN (808)*
http://rlifiles.com/files/resource/Comm_Assess_Tools.pdf
- No Success Without Succession, Michael McQueen 2010
<http://www.clubrunner.ca/Data/7080/132/HTML/105658//NoSuccess.pdf>
- Membership Page at www.rotary.org
www.rotary.org/myrotary/en/learning-reference/learn-topic/membership

Key: ◆ attached insert ● online article ■ ppt

Session Topics

- 1) How will orientation of the new member help in engaging that member? *See EM-3*
- 2) Why are you in your Rotary club? **Have participants divide into groups of 4 to share their responses to this question. Then have the groups report what they learned about each other.**
- 3) What keeps you in your Rotary club? **Have participants select a different partner for this question. Report out**
- 4) Why is it important to engage our members? **Facilitate a discussion and note responses.**
- 5) What strategies can your club use to engage its members?
Brainstorm ideas and best practices for engagement.

Insert EM-1: Membership Satisfaction Survey

(3 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)

- Insufficient knowledge Lack of quality service projects
 Personality conflicts Lack of support from other members
 Cost Insufficient family involvement
 Personal time conflicts 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"/>

	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? _____











What response does your spouse/partner/family have to your involvement in Rotary? *(check all that apply)*

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

Insert EM-2: 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>Pair Bonding. 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>A Minute in the Life. 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>Web-Connected. 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>RLI Posse. 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 www.rotaryleadershipinstitute.org.</p>
 <p>Party Time. 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>Adopt-a-Class. 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>"Flash Mob" Project. 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>Career-Share. 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>How Do You Interact? 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>Fun Committee. 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

Insert EM-3: 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 and Remedy Engagement Problems
- 12) Be Innovative – Highlight the Reasons We Stay in Rotary

Creating Service Projects

I am a vital part of a worldwide service organization meeting needs in communities.



Session Goals

Learn to identify, plan, organize and implement a service project in your club

Develop a business plan for your service project

Learn how to evaluate the success of your project

Materials

- ◆ **Insert SP-1:** Service Project Questions
- ◆ **Insert SP-2:** Alternative Service Projects
- □ Communities in Action: A Guide to Effective Projects. *605A-EN (112)*
rlifiles.com/files/resource/Communities_in_Action_605a_en.pdf
- □ Community Assessment Tools. *605C-EN (1006)*
http://rlifiles.com/files/resource/Comm_Assess_Tools.pdf
- □ Working in the Community
rlifiles.com/files/resource/Working_in_the_Community.pdf
- □ The Rotary Foundation's Six Areas of Focus 965-EN
www.rotary.org/myrotary/en/document/rotary%E2%80%99s-areas-focus
- □ Club President's Manual 222-EN(910)
rlifiles.com/files/resource/Club_President_Manual_222en_907_p15-25.pdf

Key: ◆ attached insert ● online □ article ■ ppt

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) Outline the steps you should take.
 - *Determine the need*
 - *How do you approach the club: make a plan or with just an idea?*
 - *Establish buy-in*
 - *Gain support of club members and the community*
 - *Time, costs, level of involvement, and size of project are important*
 - *How does the project fit in with other club activities?*

"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*

- 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?
 - e) How will your club finance the project?
- 2) Develop a “business plan” for a service project. Consider the factors discussed above under Question 1.
Facilitator Note: Divide the class into groups of 3-5 participants. Using the service project ideas on Insert SP-2, ask all of the groups to create a business plan to be shared with the entire class. You may ask all small groups to prepare the business plan for the same service project, or you may ask one group to work on Project A, one to work on Project B, etc. Alternatively, ask each group to develop details for a different element of the project (e.g., determining need, obtaining funding, etc.). Ask each group to designate a reporter to report back to the entire class. The use of easel pad sheets is recommended.
- 3) How will you evaluate the success or lack of success of the project?
Possibilities: Survey the beneficiaries, survey club members who participated in the project, maintain records of number of users, consider whether budget was adequate, consider hurdles that were not anticipated, etc.
- 4) Review the plan for creative, “outside the box” alternatives or changes to the project. How could you make it “bigger, better, bolder?”
Examples: (1) A club might partner with another Rotary club, a Rotaract or Interact club, another district, or another non-Rotarian organization in the community, such as a government agency, church, or other non-profit group to duplicate the project or make it bigger. (2) A club might expand its service “footprint” to include more beneficiaries or a related group of beneficiaries. (3) A club might expand into related areas based on project success, such as expanding a school literacy project to include mentors for children, child nutrition education, or actual meals served at the school.
- 5) Fundraising or “Friend-raising”
- a) Discuss the differences between a community service project and a purely fundraising event. Can the two be combined?
 - b) How can a fundraising event also be a “friend-raising” event for Rotary? How can a fundraising event be used to inform and educate non-Rotarians about the good work Rotarians do, and thereby gain friends for Rotary?

- 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!

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!**

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

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?

Insert SP-2: Alternative Service Projects

Service Project A

Rotarians and community leaders have been concerned that there are not enough recreational facilities and activities for teenagers in the community. With little to do and no place to “hang out,” teenagers have been gathering at the shopping mall or the town square, sometimes getting into trouble and harassing older people and other teens.

A team of Rotarians visited the Mayor who agreed that more recreational facilities and activities are needed for teenagers, but the town budget cannot pay for a youth center, etc. The Mayor did say that the town has a vacant lot that could be donated or used for some purpose. It also has a vacant two-room school building that could possibly be repaired and used for teen activities; however, it has not been used for several years and is not in very good condition.

Service Project B

Members of your club have talked to the head of the local welfare department about possible projects, and she told them of an elderly couple who were largely confined to their home because they couldn’t navigate the 5–6 steps to the front of their home. They also had trouble climbing the steps to their bedroom and often ended up sleeping on a couch or even on the floor. The head of the welfare department asked if Rotary could help the couple in any way.

Service Project C

Members of your club have talked with the principal and some teachers and guidance counselors at an elementary school in town to learn the major issues for the students. Unfortunately, there are a lot of problems, but the educators believe that the most significant issue is that some third graders are far behind in reading skills, and some can’t read at all. Can or should your Rotary club do anything with this school? If so, what?