



A Joint Project of over 350 Rotary Districts worldwide

2015-18

FACULTY—PART II

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 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 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.



Strategic Planning & Analysis

4

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?



Attracting Members

18

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!



Club Communication

21

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



Team Building

26

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!



Foundation II: Targeted Service

32

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!

Coming Attractions

Last Page

Course Evaluation

Handout

Strategic Planning & Analysis



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

Session Goals	Materials
Analyze Your Rotary Club	◆ □ SPA-1: Rotary Club Self-Evaluation of Performance & Operations
Review Possible Areas of Improvement	◆ □ SPA-2: Strategic Planning Guide. <i>EN (109)</i>
Discuss How Specific Improvements Should be Made	◆ □ SPA-3: RI Strategic Plan Priorities & Goals 2010
Understand the Process for Strategic Planning	● □ Rotary Club Central https://www.rotary.org/myrotary/en/secure/13301
	● □ What Will Rotary Look Like in 10 Years? rlifiles.com/files/resource/Rotary_in_Ten_Years_EN-_209_.pdf
Key: ◆ attached insert ● online □ article ■ ppt	

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

Session Topics

Club Analysis

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) Complete the survey as directed.

Instructions to Facilitator:

a. *It is suggested that class be divided into small groups.*

b. *Have each group complete one section of the survey:*

Club Administration

Membership

The Rotary Foundation

Structured Programs / Public Image

- c. ***When completing Club Evaluation Survey in the session, the points do not apply. If participant does not know the answer, assign “DK – Don’t Know”.***
- d. ***Advise participants to not add points in each section.***
- e. ***Do not assign the bonus questions.***

“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

- 3) What was your reaction to the survey?

Discuss within the entire group. Ask participants to briefly explain their reaction and suggestions for improvement. What are you going to do in your club.

- 4) 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?

Each group suggests improvements for the area of the survey they completed.

Strategic Planning

1. Rotary International suggests that clubs develop strategic plans. What is a strategic plan? Why do we need one? What are the benefits?

There are many ways to do strategic planning, and some of your club members may have experience with a particular process..”Visioning”. How can you discover and use this expertise? Are there other people resources you can call on for assistance?

2. Based on your previous group 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?

Note: Use same small groups established in the Club Analysis section.

3. What is the process of creating a strategic plan? 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?
4. 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?
5. Rotary International has a Strategic Plan. (See Insert SPA-3). How can you use it in your club’s strategic planning process.

Insert SPA-1 (8 pages)

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. Divisions and districts are free to adopt and utilize the evaluation.

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 is 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 is. _____
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 is. _____

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

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

Please add the totals points for questions 1-47

Club Administration _____

Don't knows _____

Membership

Score _____

Please assign points for the following:

1. The average monthly club attendance figure is **90-100%** (5 pts), **80-89%** (4 pts), **70-79%** (3 pts), **60-69%** (2 pts), **50-59%** (1 pt), don't know (DK) _____
2. The average age of the club membership is **35-40** (5), **41-50** (4), **51-60** (3), **61-70** (2), **71+** (1), don't know (DK). _____
3. Last year, the club's membership **increased** (5), **remained the same** (3), **decreased** (0), don't know (DK). _____
4. This year the club membership is likely to **increase** (5), **remain the same** (3), **decrease** (0), don't know (DK).. _____
5. The club has sponsored a new club within the **last 1-3 yrs** (5), **4-8 yrs** (4), **9-12 yrs** (2), **longer or never** (0), don't know (DK). _____
6. When a member relocates to another community, the club **always** (5), **sometimes** (3), **never** (0) notifies the nearest Rotary club of the move. _____
7. New members are **always** (5), **sometimes** (3), **never** (0) encouraged to become active in the club _____
8. The club **frequently** (5), **often** (4), **seldom** (2), **never** (0) holds special membership drives (cocktail, wine & cheese parties, meet & greet, etc) to identify and attract potential new members. _____
9. The club **always** (5), **sometimes** (3), **seldom** (1), **never** (0) 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

Score

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 Rotary 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 assign points for 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), **three months** (3), **six months** (1) **never** (0). _____
- 9. **All** (5), **most** (4), **many** (3), **some** (2), **few** (1), **none** (0) of the club members know about Paul Harris Fellows and how to become one. _____
- 10. **Most** (5), **many** (4), **some** (3), **few** (2), **none** (0) 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, a global scholar or a peace scholar **within the last 1-3 yrs** (5), **4-6 yrs** (3), **longer or never** (0), don't know (DK). _____

- 12. My club has hosted a visiting GSE team **within the last 1-5 yrs (5), 6-8 yrs (3), longer or never (0)**, don't know (DK). _____
- 13. My club has applied for a Global Grant with an international partner **within the last 1-3 yrs (5), 4-6 yrs (3), longer or never (0)**, don't know (DK). _____
- 14. My club has applied for a District Grant **within the last 1 yr (5), 2-3 yrs (3), longer or never (0)**, don't know (DK) _____
- 15. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Fellows _____
- 16. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Sustaining Members _____
- 17. **Most (5pts), many (4), some (3), few (2), none (0)** of club members are bequest donors to The Rotary Foundation. _____
- 18. **Most (5), many (4), some (3), few (2), none (0)** club members are benefactors to The Rotary Foundation _____
- 19. **Most (5), many (4), some (3), few (2) none (0)** of club members are Paul Harris Society members. _____
- 20. **Most (5), many (4), some (3), few (2), none (0)** of club members are Major Donors to The Rotary Foundation. _____
- 21. **Most (5), many (4), some (3), few (2), none (0)** 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

Score

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 is _____
- 3. The use of career development programs by the club in local schools to help students with career choices is. _____
- 4. The club's effort to promote high ethical standards, professional dignity or service performance in the club and community is _____
- 5. The club's effort to conduct one new community service project each year is _____
- 6. The club's effort 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. Please add 3 pts for each service project that your club has done *within the last 3 years*

The club has conducted an active program or project in the following areas:

- 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 at least one outstanding student or student leader
- 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 at least one student with a Rotary Youth Leadership Award (RYLA). _____

Please add the total points for questions 1-23

Service Projects _____

Don't knows _____

Rotary Publicity & Public Relations

Score _____

- 1. Our club **always** (5), **often** (3), **seldom** (1) **never** (0) has articles or pictures of our activities in the local media. _____
- 2. Our club **always** (5), **often** (3), **seldom** (1), **never** (0) uses the Public Access channels to promote or publicize our activities. _____
- 3. The members of the club **always** (5), **often** (4), **seldom** (1), **never** (0) wear their Rotary pins. _____
- 4. Our club has **many** (5), **some** (3), **one** (1) **no** (0) 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), **often** (4), **seldom** (1), **never** (0) 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 _____

Bonus Questions

Score _____

- 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 a service project within the last 2 years. (Y=5 N=0) _____
- 7. I visit the club, district or Rotary International web sites **daily** (5), **weekly** (4), **monthly** (3), **occasionally** (2), **never** (0) _____

- 8. I **always** (5), **sometimes** (3), **never** (0 pts) make-up for a missed meeting..... _____
- 9. I have personally served on a district committee within the last **1-5 yrs** (5), **6-10 yrs** (3), **longer or never** (0)..... _____
- 10. I have attended the district conference or International convention within **the last year** (5), **2-5 yrs** (3), **longer than 5 yrs** (1), **never** (0)..... _____
- 11. I have contributed to The Rotary Foundation within the last **1 year** (5), **2-3 years** (3), **4 years or more** (1), **never** (0)..... _____

Please add the total points for questions 1-11 _____ **Bonus Questions** _____

Totals

Total Club Administration (from page 7)	_____	out of 235 points	DKs	_____	(38)
Total Membership (from page 9)	_____	out of 165 points	DKs	_____	(29)
Total Foundation (from page 10)	_____	out of 110 points	DKs	_____	(10)
Total Service Projects (from page 12)	_____	out of 173 points	DKs	_____	(2)
Total Rotary Public Relations (from page 12)	_____	out of 55 points	DKs	_____	(6)
Total Bonus Questions (from page 13)	_____	out of 55 points			
GRAND TOTAL	_____	out of 793 points			

- 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

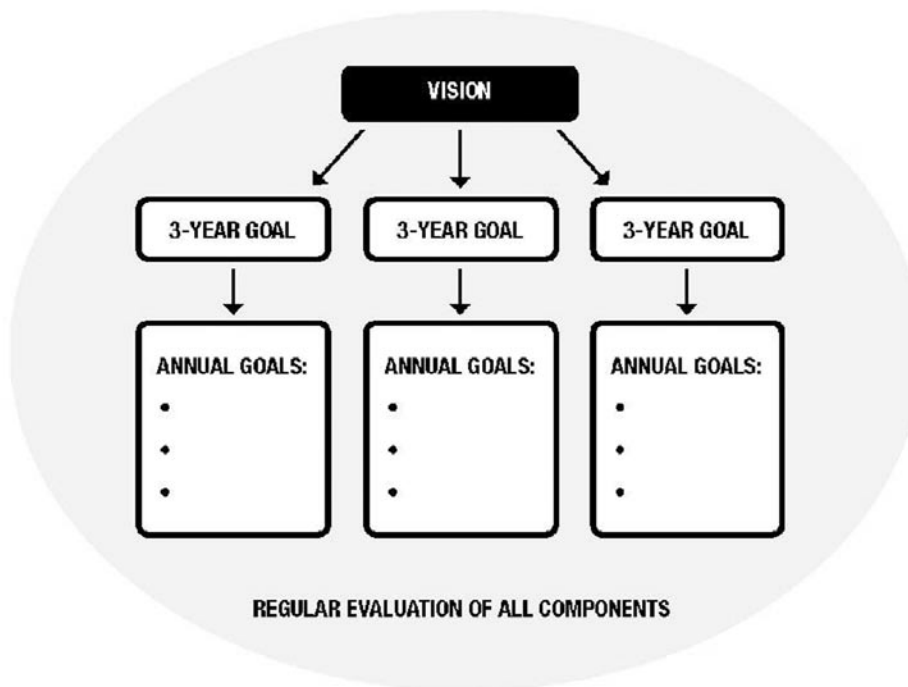
Please DO NOT make any adjustments to totals for DKs. The following is for reference only.

- 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 copy of this survey for duplication is available 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

- Prioritize the three-year goals based on participant consensus. As a group, decide on the top two or three goals that will have the greatest impact as your club works toward the vision.

- Identify annual goals that support each of the top three-year goals.

- Determine the deadlines, resources, and people necessary for meeting the first annual goal for each of the three-year goals.

4. How are we doing?

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

Strategic Planning Worksheet

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

1. Where are we now? _____

Today's date: _____

Describe your current stage:

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: _____

Annuals goals:	Deadlines:	Resources needed
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Three-year goal 2: _____

Annuals goals:	Deadlines:	Resources needed
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Three-year goal 3: _____

Annuals 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

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

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

Define the attributes of a good Rotarian.

Explore how my club can attract good Rotarians.

Materials

- ◆ Insert AR-1: The Membership Process Chart
- ◆ Insert AR-2: The Club Membership Committee
- Classification Survey. 417-EN-(808) *See pg 41.*
<https://www.rotary.org/myrotary/en/document/organizing-new-clubs-guide-district-governors-and-special-representatives>
- Membership Development Resource Guide.
rlifiles.com/files/resource/MembDevResourceGuide417en.pdf
- How to Propose a New Member. 254-EN-(709)
<http://rlifiles.com/files/resource/HowToPropose254en.pdf>

Key: ◆ attached insert ● online article ■ ppt

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

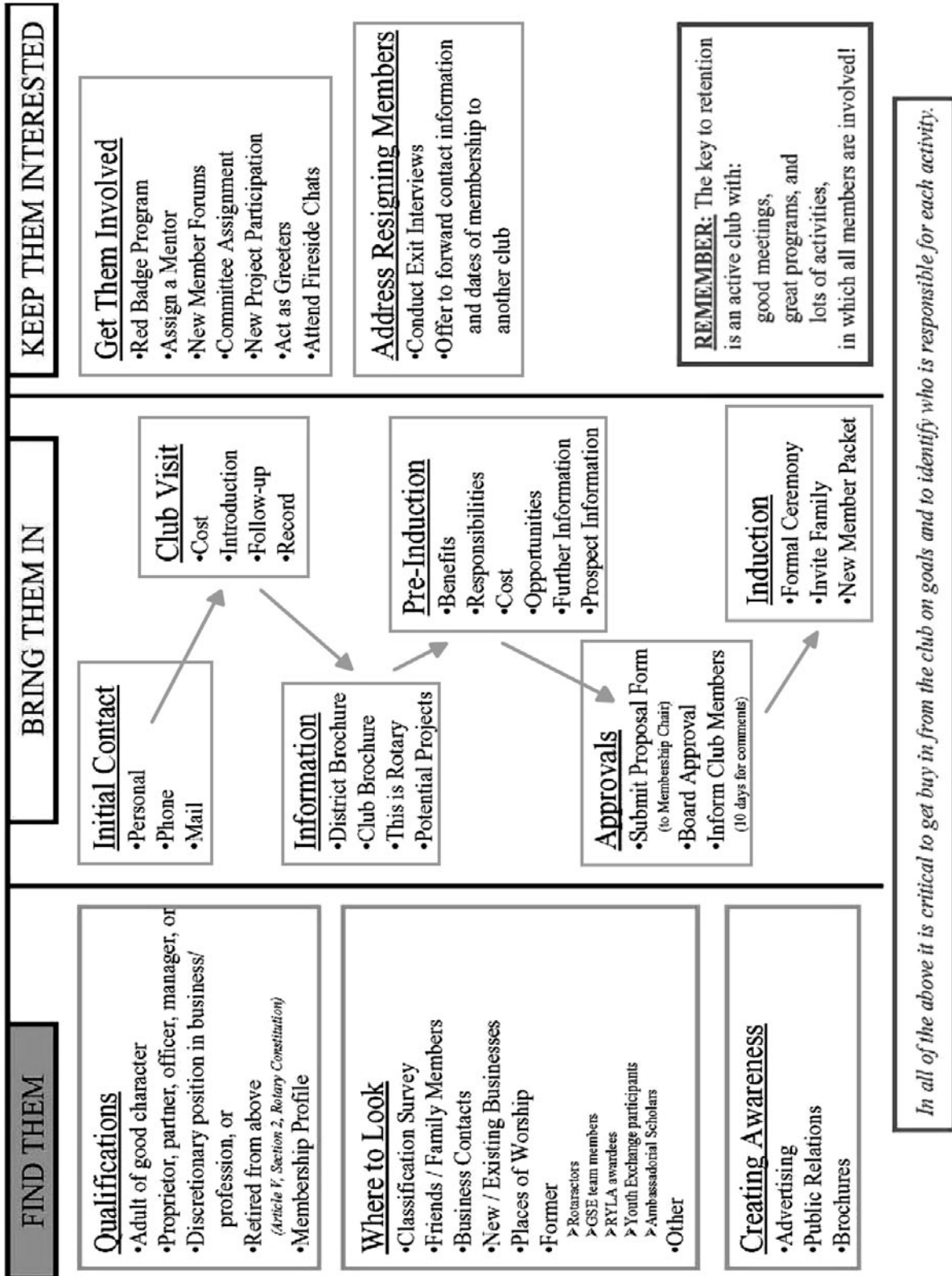
Session Topics

- 1) Where in our community can we find potential “good Rotarians”?
Have participants list attributes of good Rotarians. You can do this as a large group or break into smaller groups and report out
- 2) Discuss the make up of your club. Does it reflect your community by ways of age, gender, race, religion, and classification? How can your club attract any missing demographic or classification?
The responses may be culturally based. Be sure to review the Classification Survey.
- 3) Discuss how your club should conduct your membership campaign? How do they recruit new members? How do you invite new members?
Develop a good discussion about how they bring in new members. Refer to inserts on the Membership Process and Club Membership Committee.

Discussion leaders: Divide into small groups and develop a new member campaign. Be prepared to discuss with entire group.

Insert AM-1: Membership Process Chart

THE MEMBERSHIP PROCESS



HMH Rev. 8/25/04

Insert AM-2: 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:

Club Communication



I can serve by leading and promoting effective communications to my club's internal audience.

<p>Session Goals</p> <p>Understand the elements of effective communication</p> <p>Apply effective communications to Rotary leadership</p>	<p>Materials</p> <ul style="list-style-type: none"> ◆ □ Insert CC-1: Speaker Introduction Guidelines ◆ □ Insert CC-2: 10 Tips for Public Speaking ◆ □ Insert CC-3: Internal Communications (case study) Organization ● □ The 10 Commandments of Communication <i>rlifiles.com/files/resource/10_Commandments_of_Communication.pdf</i>
<p>Key: ◆ attached insert ● online □ article ■ ppt</p>	

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

Session Topics

- 1) What opportunities exist for a leader or any member of a Rotary club to communicate with others, most or all of the other club members?

Committee Chairs and members, Executive Committee, Board Members or prospective members and community.

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

Members without email, those people with disabilities such as hearing, vision, literacy.

"Rotary's greatest strength will always be the individual Rotarian. No other organization has such powerful human resources."

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

Discuss various forms of communication and when each one is appropriate.

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

Communication Practice: Oral

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

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. Refer to CC-1 for guidelines.

Communication Practice: Written

Frequent written communication (including what is posted on social media, etc.) is also necessary in a Rotary club.

Insert CC-3 can be used to provide practice in making a written communication plan.

Leader's note: Consider having part of the group do the oral exercise and the other part(s) of the group do the written exercise if you have too many participants to complete both in a timely manner. Or the group can decide which activity is more relevant to them.

Wrap-up:

Review the value of both types of communication, and finding people who are good at producing them, within the club.

Insert CC-1:



INTRODUCING A SPEAKER

Some Things to Think About

- **The Preparation**

- Visit with the speaker beforehand. If you can't, do some research (Google, etc.).
- Learn one or two personal bits of information about the speaker to use in the introduction.
- Think of something you can share from your own experience that connects you with the speaker and/or topic.
- Pick out a few relevant items to use from the printed bio but, above all, don't "read" the bio!

- **The Approach**

- 60 to 90 seconds is about right.
 - Practice and time yourself
- Avoid clichés: "This person needs no introduction," for instance.
- Develop eye contact with the audience; Look up frequently from your notes
- Be enthusiastic and upbeat

- **The Introduction**

- Introduce yourself unless someone has already done it for you
- Identify the speaker and the topic/title
- Explain why the speaker is qualified to speak on this topic (background; current or past positions, etc.)
- Tell why this subject is important to your audience
- Share some personal information about the speaker (and you)
- End the introduction on a high note with your voice and body language, i.e. "It is MY PLEASURE to present....etc."
- Welcome the speaker to the lectern, shake hands and "turn over the audience" to him or her.

Source: Zones 21b/27 Rotary Institute 2014

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

Internal Written Communication Case Study

For many years, adult literacy has been a major issue in Kansas City, Missouri, USA. At one time, nearly one in five adults in Kansas City was functionally illiterate, making this group more vulnerable to poverty, unemployment, and homelessness.

Members of the Rotary Club of Kansas City knew something had to be done and surveyed the community to determine what it would take to address adult literacy issues. The study revealed that the costs, expertise, and time needed to start a new literacy program were well beyond the club's means.

Undeterred, the club began looking at community organizations already working to educate adult students, including the Laubach Literacy Council, which had about 50 adult students, an all-volunteer staff, and a donated classroom. Club members wanted to locate and refurbish new classrooms in a local church, expand the council's staff, and increase the number of students at the center.

To raise money for the center and its expansion, the club decided to organize a corporate spelling bee. Rotarians, local company employees, and community members will form 10 four-person teams, and local businesses will sponsor the teams and provide services for the event at discounted rates.

Group 1:

- 1) What do you need the club members to do?
- 2) How will you use the club **web site and/or Facebook page** to enlist members' help?
 - a. What info needs to be provided?
 - b. What is the sequence of info to be provided?
- 3) Who in the club is responsible to see this gets done?

Group 2:

- 1) What do you need club members to do?
- 2) What written communication avenues (other than the club web site and Facebook page) will be used to enlist members' help?
 - a. What will be provided at club meetings?
 - b. What social media can you use?
 - c. What info needs to be provided in each communication?
- 3) Who in the club is responsible to see this gets done?

Team Building

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



Session Goals

Explore How Committees and Team Building are used in Rotary Clubs

Discuss the Advantages and Disadvantages of Committees

Examine Committees as a Tool of Leadership

Examine your own Leadership Style

Materials

- ◆ □ Insert TB-1: Club Committee Structures
- ◆ □ Insert TB-2: Club Coat of Arms Exercise
- ◆ □ Insert TB-3: Urbana Univ. Exercise
- □ Club President Manual 222-EN (910)
rlifiles.com/files/resource/Club_President_Manual_222en_907_p15-25.pdf
- □ Be a Vibrant Club 245-EN (111)
<https://www.rotary.org/myrotary/en/document/be-vibrant-club-your-club-leadership-plan-north-america-245en>

Key: ◆ attached insert ● online □ article ■ ppt

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

Discussion leader: For the coat of arms/banner exercise, have some larger paper and colored markers or crayons available for each group.

Session Topics

- 1) Why should we use team building and committees in a Rotary club?
- 2) How can the “Be A Vibrant Club” plan assist us in forming committees?
- 3) How can we make effective use of Rotarian teams and committees?
Use committee structures insert TB-1.

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

4) In the committee, what is the role of the Committee Chair?

Setting the schedule, building team spirit, motivating the committee, appropriate delegation.

Club President?

Define initial mission, follow-up and deadlines, be available as a resource, do not micro-manage.

Secretary?

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

5) Planning activity...Suggestions:

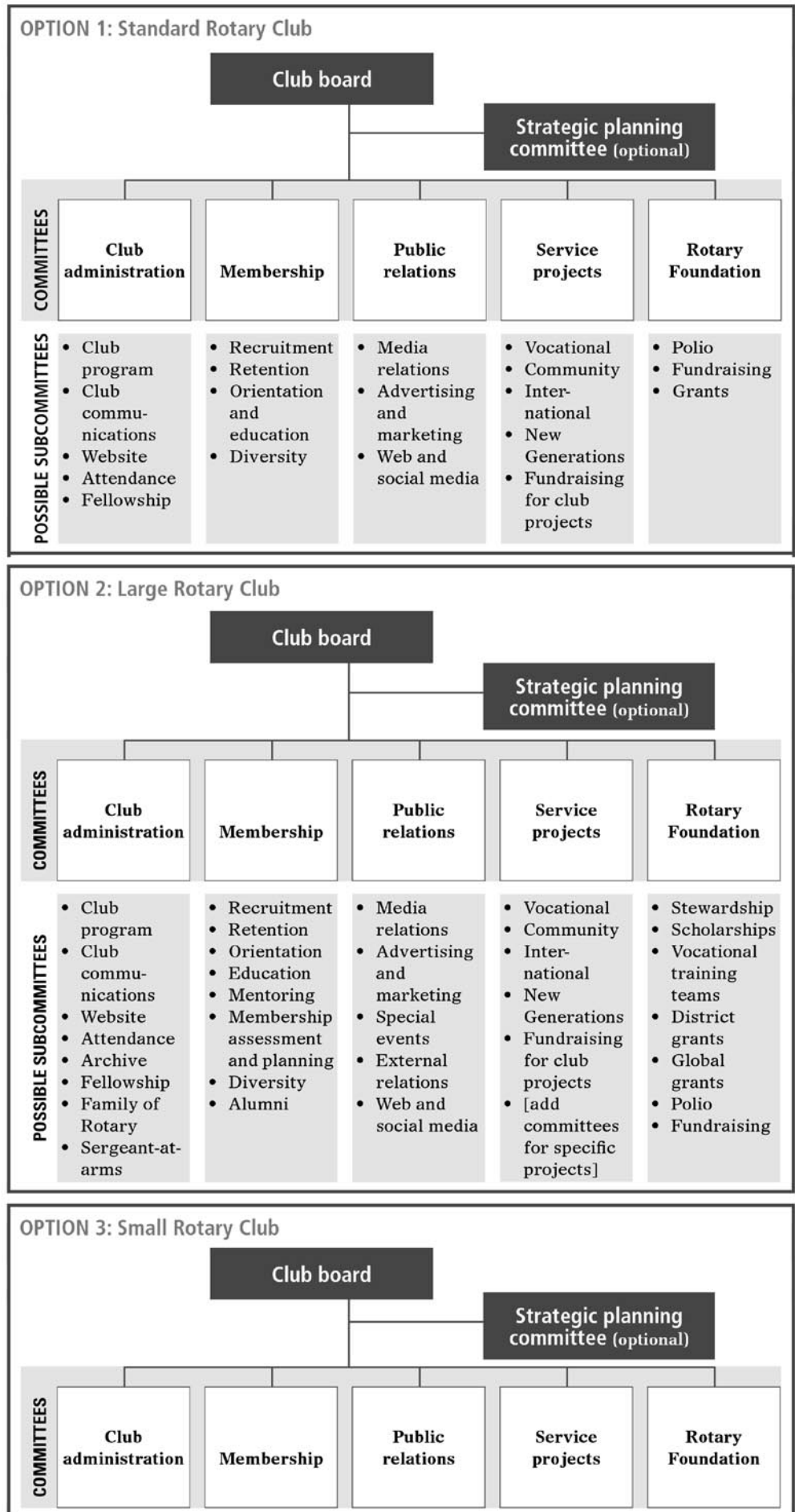
- *Each group select a goal from the strategic planning session earlier in the day as a starting point (note connection among the sessions of Part II)*
- *Use Coat of Arms activity as explained in TB-2.*
- *Use Urbana University of Illinois activity (TB-3)*

After completing the chosen exercise, 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

Five committees are recommended for Rotary clubs. Clubs can add or eliminate committees or subcommittees according to their interests and activities. Assistant governors or district governors can assist club leaders with determining the appropriate subcommittees.



Insert TB-2: Club Coat of Arms / Banner Exercise

GOAL: To create a Rotary Club Coat of Arms or Banner

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

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

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

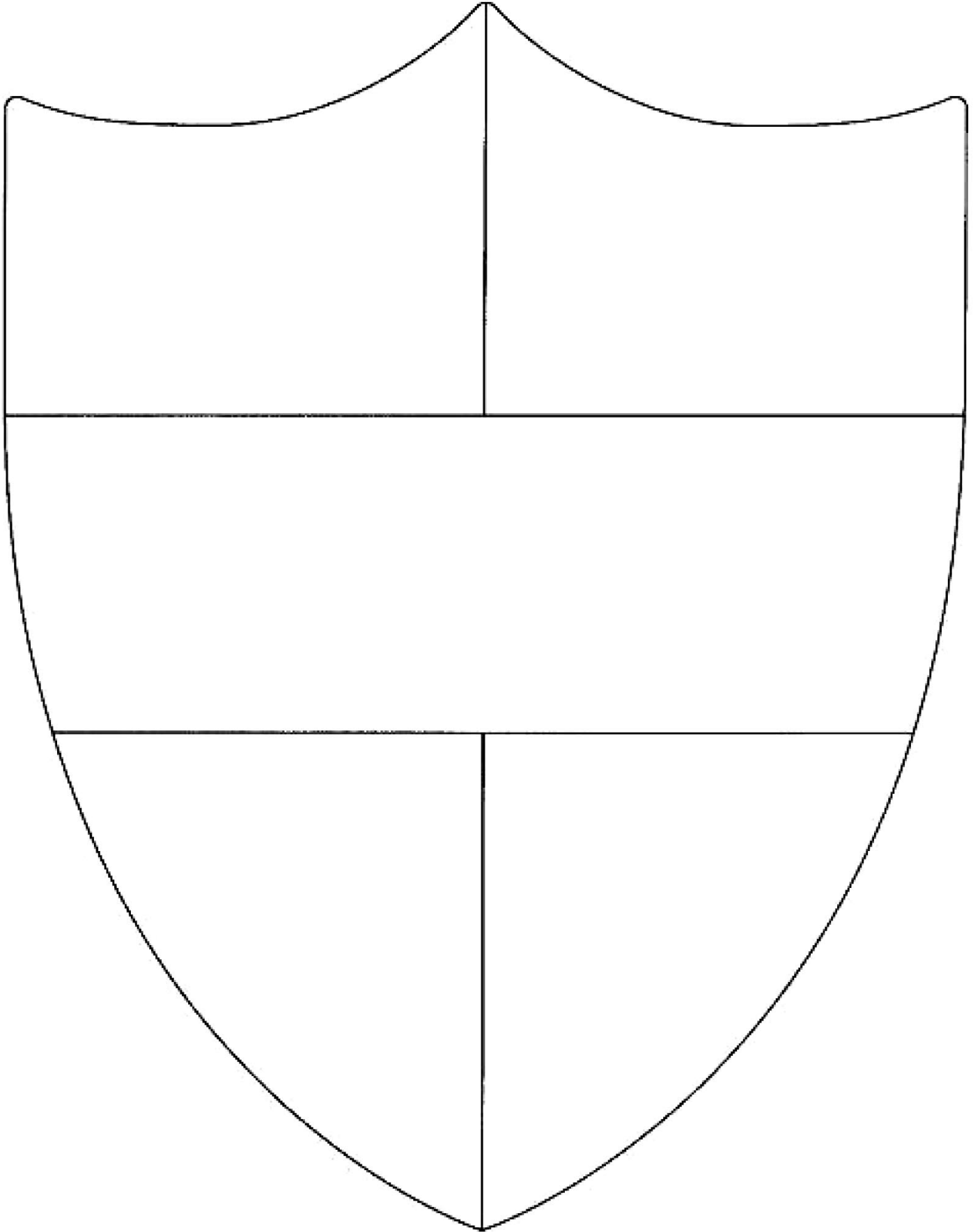
INSTRUCTIONS: Heraldry is the practice of designing, displaying, describing and recording a coat of arms. It is a system of identification that is a very personal and unique form of individual or group expression. A coat of arms is used to illustrate specific characteristics, deeds, accomplishments or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

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

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

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

Club Coat of Arms



Insert TB-3: Urbana University of Illinois Exercise

Background:

The Club began six months ago with 4 leaders who had become impressed with Rotary through Polio Plus activity and results. They started meeting weekly on Wednesdays at 5:30 and agreed amongst themselves that they would bring together a strong group of leaders like themselves within the next year. The four took on the offices of President, Vice President, Secretary, and Treasurer. To date they have recruited 26 new members.

Within a month, a community service project was being accomplished each month. These projects were being so well accomplished by the team of 4 that new members were recruited by each new project. Each Club meeting was a planning meeting for next month's project or a speaker from the community describing a specific need. New members were put in charge of certain parts of the service projects. As members became excited about what the Club was able to accomplish, they started to recommend their friends for membership.

New members were also recruited from the Club program speakers.

Current Situation:

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

Assignment:

In the next 15 minutes, develop a recommendation on how this club can build a team.

What specific steps do they need to follow?

Foundation II: Targeted Service



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: Foundation Grant Model
- ◆ Insert TS-2: Share System & Foundation Funding
- ◆ Insert TS-3: What is Sustainability?
- ◆ Insert TS-4: Grant Model Flowchart
- ◆ Insert TS-5: Case Studies
- ◆ Insert TS-6: Areas of Focus
- □ Rotary Foundation Reference Guide *219-EN (114)*
http://rlifiles.com/files/resource/Quick_Ref_Guide_219en.pdf
- Learning & Reference page at Rotary.org
<https://www.rotary.org/myrotary/en/learning-reference>

Key: ◆ attached insert ● online □ article ■ ppt

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

Session Topics

- 1) Let's take a brief look at 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?
See Insert TS-1. Discuss each type of grant and how each one can effect your club.
- 3) How do the Annual Fund, the Endowment Fund, and the World Fund work together to fund grants?
How does the Share program benefit clubs?
See Insert TS-2 SHARE System & Foundation Funding.

- 4) Let's take another look at the six areas of focus. Why are they important?

See Insert TS-6 Areas of Focus

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, (e) 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-6: The Areas of Focus Chart.

Optional exercise: Break into up to 6 small groups, one for each area of focus. Give small groups a period of time to suggest what a club, preferably their club, could possibly do for a project in each area of focus. Reports to full group.

- 5) What is the value of sustainability in projects?

See Insert TS-3: What is Sustainability? Lead a discussion for this question.

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.**

- 6) 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.

7) 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-4 Grant Model Flowchart, TS-2 SHARE Flowchart, TS-6 Areas of Focus Chart & TS-3 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.

8) 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.

9) 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 easy 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.

Note for discussion leaders: Annual Fund contributions will fund project costs after the three year investment cycle, some will fund operations. In "THE DETAIL" on Insert TS-2: Share Flowchart, it is explained as follows: "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.

Conclusion of Session—Select just a few items to summarize.

- ***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.***

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

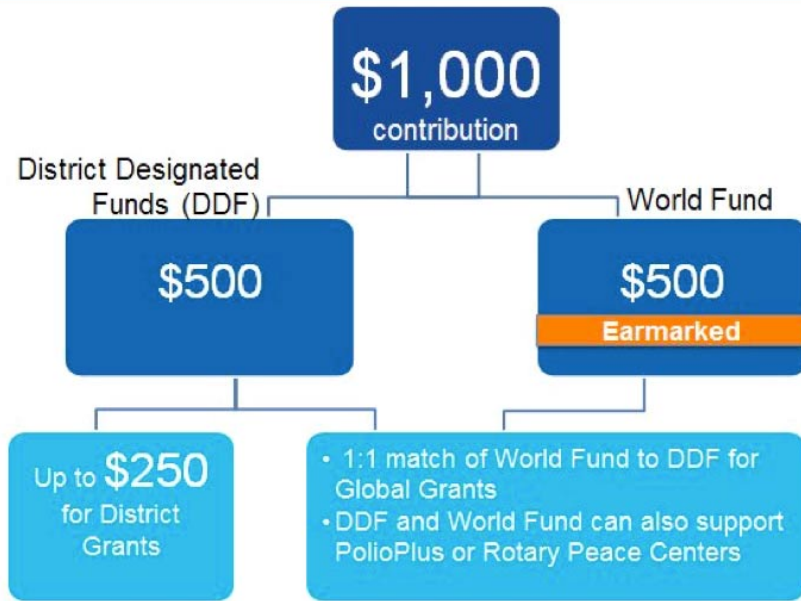
Insert TS-1: Foundation Grant Model

District Grants	Global Grants
<p>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.</p>	<p>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.</p>
<p>Humanitarian projects, including service travel and disaster recovery efforts; Scholarships for any level, length of time, location, or area of study; Vocational training teams.</p>	<p>Requires clubs in two countries. Funds Scholarships, humanitarian projects, and vocational training.</p>

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-2: Share System & Foundation Funding

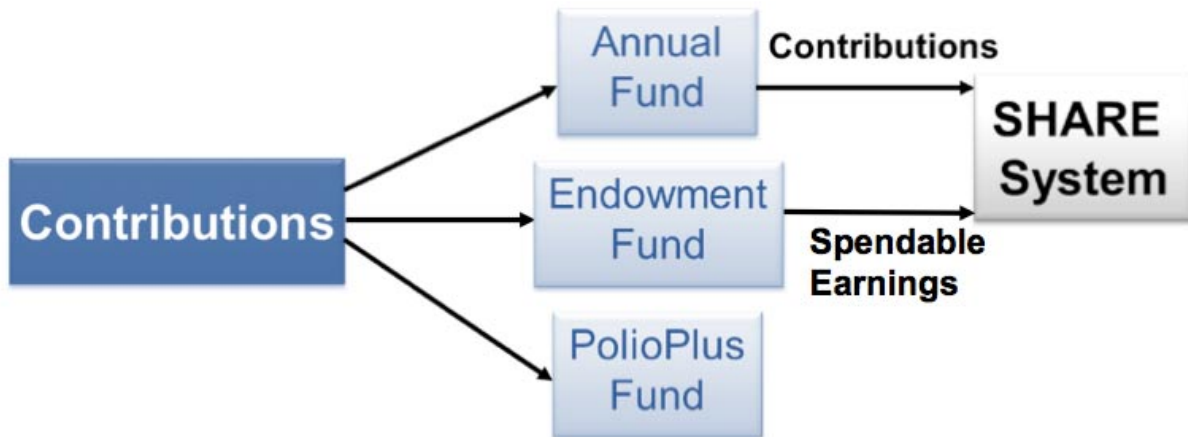
SHARE SYSTEM EFFECTIVE 1 JULY 2015



- Note this does not include DDF generated by Endowment Fund-SHARE spendable earnings.
- Unused DDF will roll forward.
- 5% of the contribution is earmarked to cover operating expenses if investment earnings are insufficient.



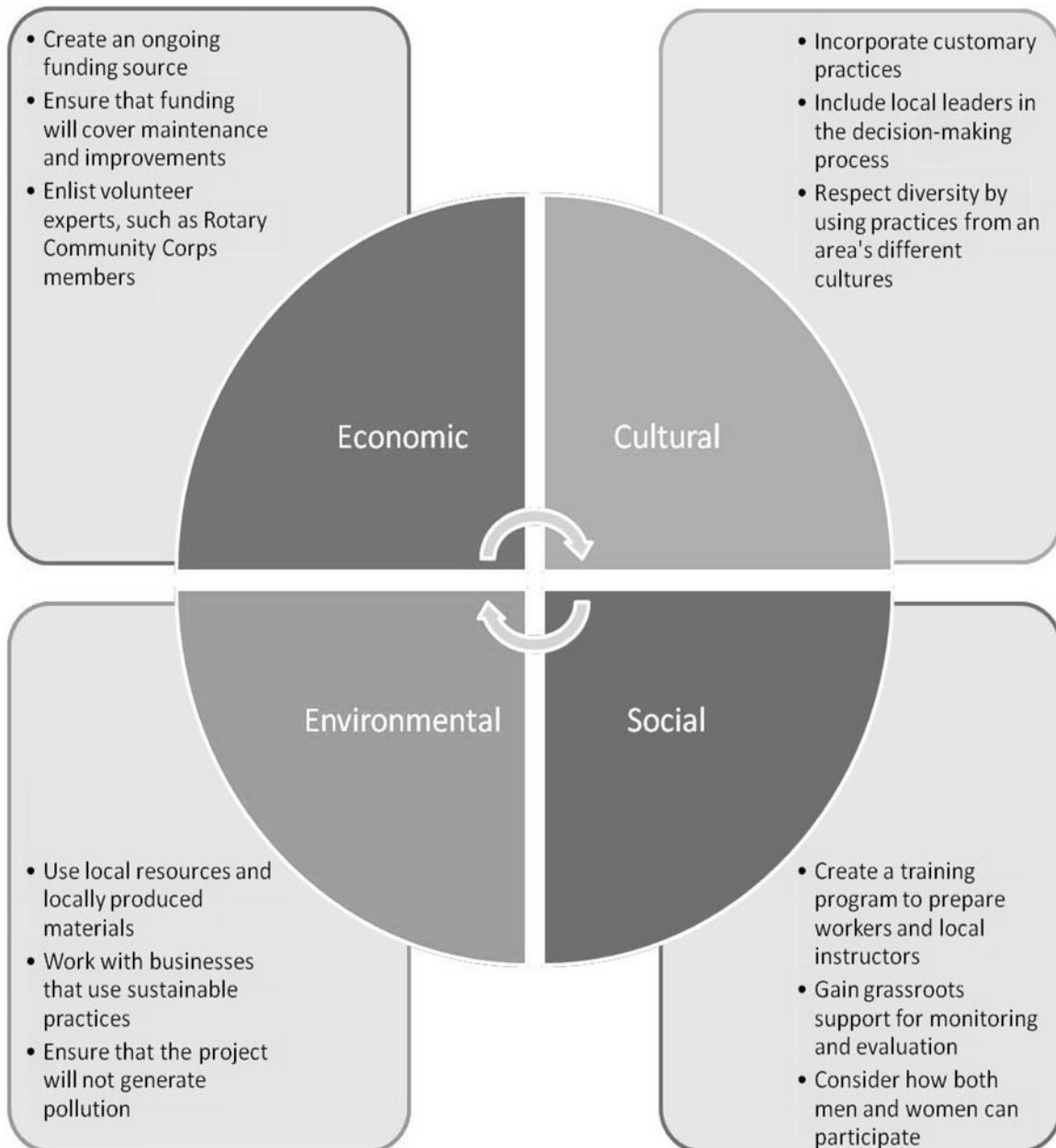
FOUNDATION FUNDING



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. 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.

Insert TS-3: What Is Sustainability?

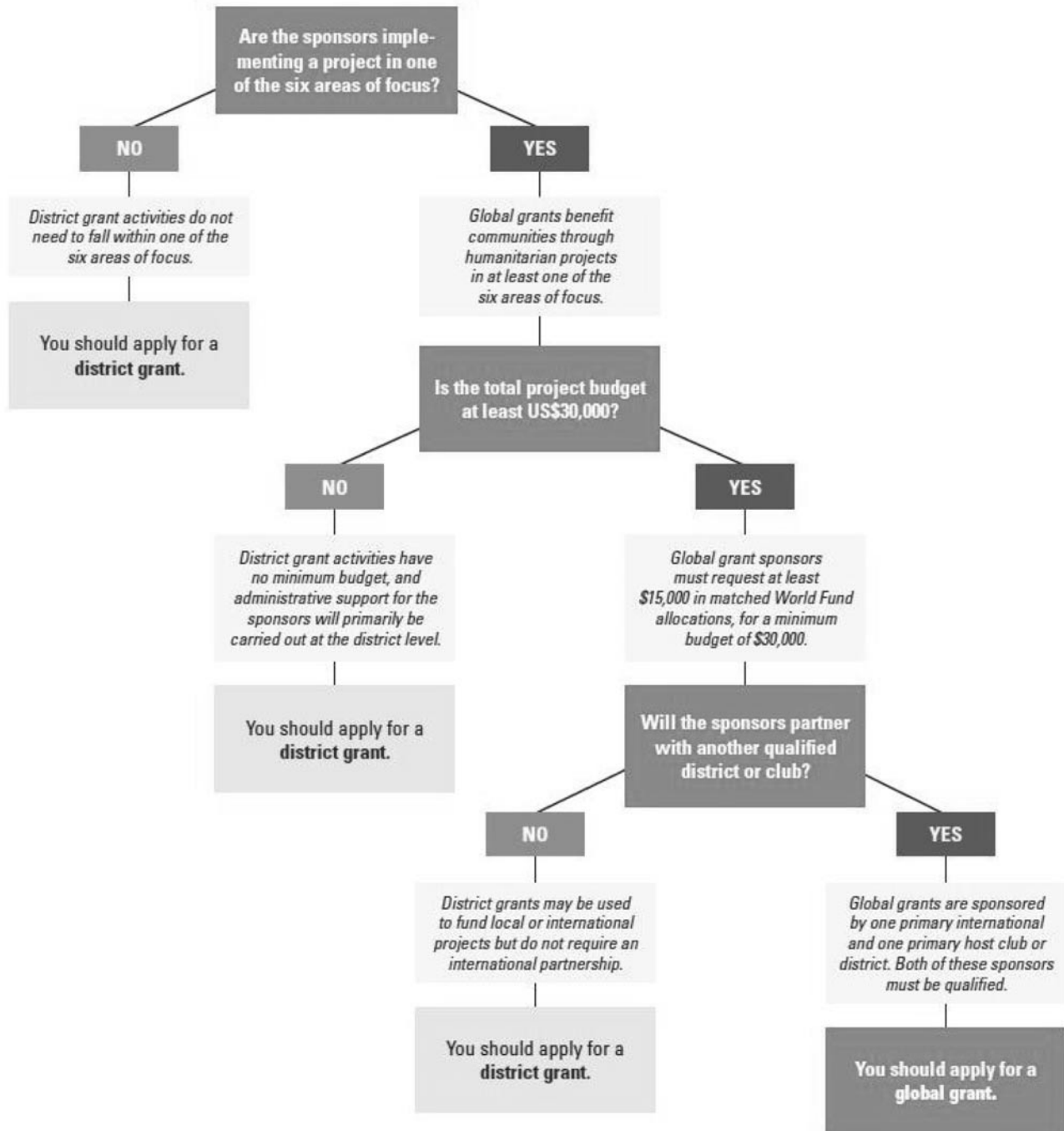
The word sustainable often describes something that is environmentally friendly. But environmental concerns are just one aspect of sustainability. Economic, cultural, and social factors are equally important. When a humanitarian project addresses all four levels of sustainability, it has a better chance 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]



Insert TS-4: 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-5: 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-6: The Rotary Foundation Areas of Focus



The Rotary Foundation Areas of Focus

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