



2023-2024

PARTICIPANT - PART I

The Rotary Leadership Institute

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](http://www.rotaryleadershipinstitute.org).

The RLI Recommended Curriculum. RLI recommends a curriculum and provides outlines and faculty materials to all its divisions. The curriculum has been continually revised and upgraded over the years. Because of the growth of RLI, it is expected that major revisions will be recommended every four 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.rliiles.com.

The RLI Curriculum Committee. RLI has determined to also hold Curriculum Committee meetings in various parts of the world. The current plan is to meet in the United States in two of each three year period and at one or two various international sites each Rotary year. All RLI Divisions will be given notice of such meetings with a request that RLI Divisions, member Districts/Clubs be requested to send their comments/suggestions to the International RLI officers. Building on actual RLI experiences around the world will enhance the value of RLI courses. **Any RLI Division may send representative(s) to any curriculum committee meeting at any location.**

RLI Part I – THE ROTARIAN

TABLE OF CONTENTS

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.

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

COURSE MATERIALS

Event Agenda, Faculty, Upcoming RLI Events, Division Leadership, and Welcome Letter are included as a supplement to the course materials or online. Outlines and materials are online at www.rliiles.com.

My Rotary World 4

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. How can these resources help me?

Ethics and Vocational Service 13

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

Foundation I: Our Foundation 17

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 29

I make my Rotary 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 36

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.

My Leadership In Rotary 41

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?

My Rotary World



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

Session Objectives

- Understand the Purpose of Rotary
- Understand the Organization Structure
- Describe how the structure impacts on them as a Rotarian

Materials:

- ❖ Insert MRW -1: Rotary's Organizational Chart of Rotary
- ❖ Insert MRW -2: Map of Zone 28/32
- ❖ Insert MRW -3: RI Action Plan <https://my.rotary.org/en/document/strategic-plan>
- ❖ Insert MRW -3: Rotary's Core Values
- ❖ Insert MRW- 4: The Object of Rotary
- ❖ Insert MRW- 5: Rotary's Five Avenues of Service
- Online Connect For Good <https://www.rotary.org/myrotary/en/document/576>
- Online Rotary Basics <https://my.rotary.org/en/document/rotary-basics>
- Online Rotary History by Region by the Rotary Global History Fellowship (RGHF) <https://rghf.org/>
- Online Contact RI Staff <https://my.rotary.org/en/contact>

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 is Rotary's Mission? What is Rotary?
- 5) What are the Five Avenues of Service? How does each relate to us as Rotarians.

6) How is Rotary structured?

The Rotary District

- 1) Why do we have Districts?
- 2) What does the District Governor do... Assistant Governor ? District Committee Chairs? Others?
- 3) Why is the District important to the club?
- 4) How would a Club learn about and contact the district?
- 5) How do I get to my District web sites **www.rotaryxxxx.org where the xxxx is the 4-digit District Number or use Googles to find the site.**

The Rotary Zone

- 1) What is a Zone and why do we have them?

- 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?
Why do we pay dues to RI?

- 2) Are there any advantages in being an international organization?

- 3) Does R.I. control/rule the clubs?
Is my club autonomous?
What is my club required to do?

4) How do we contact R.I.?

Where can we get information and help?

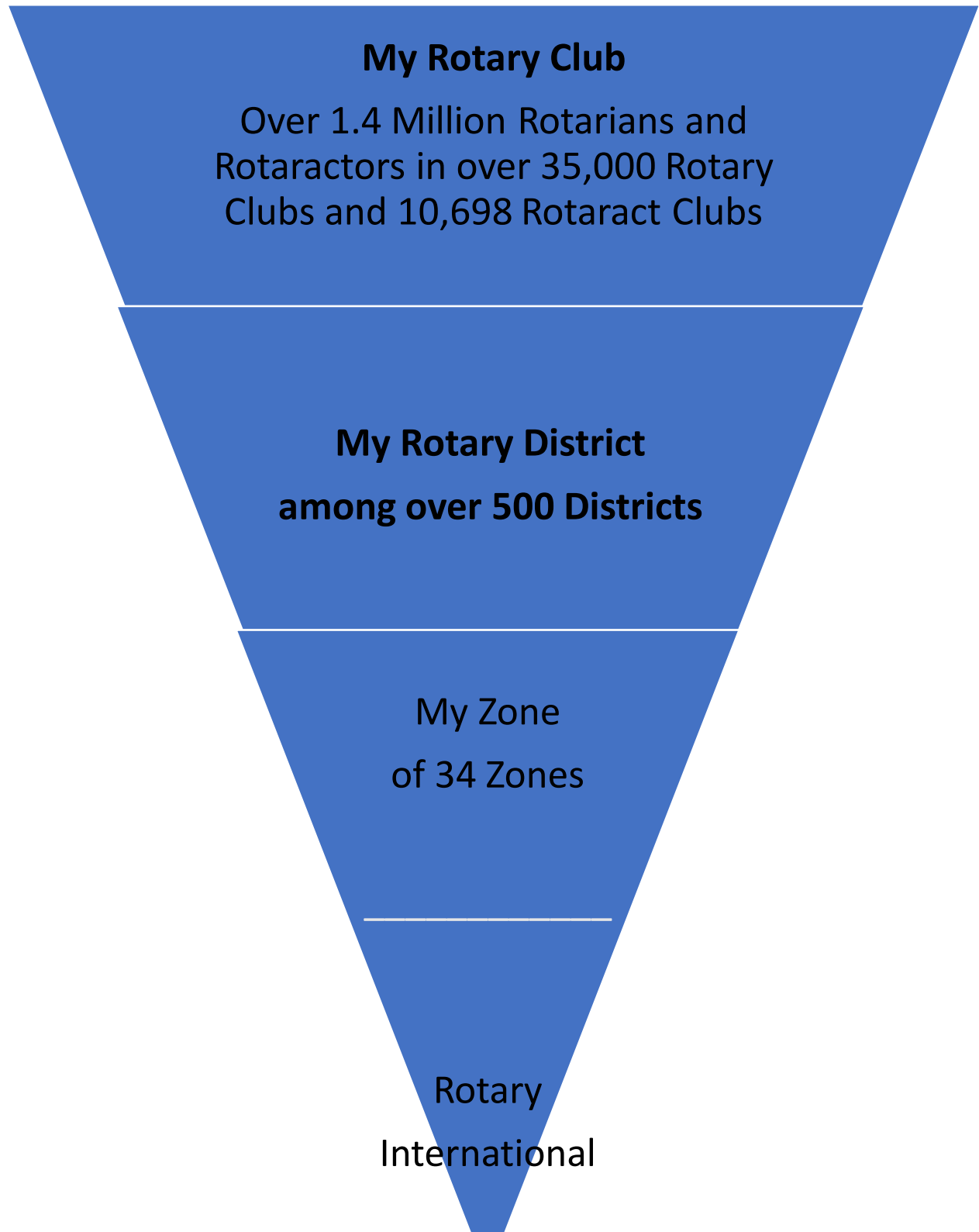
- The Rotary International Website www.rotary.org
- The Rotary Foundation Contact Center in your geographic area.
- Zone Website

NOTE:

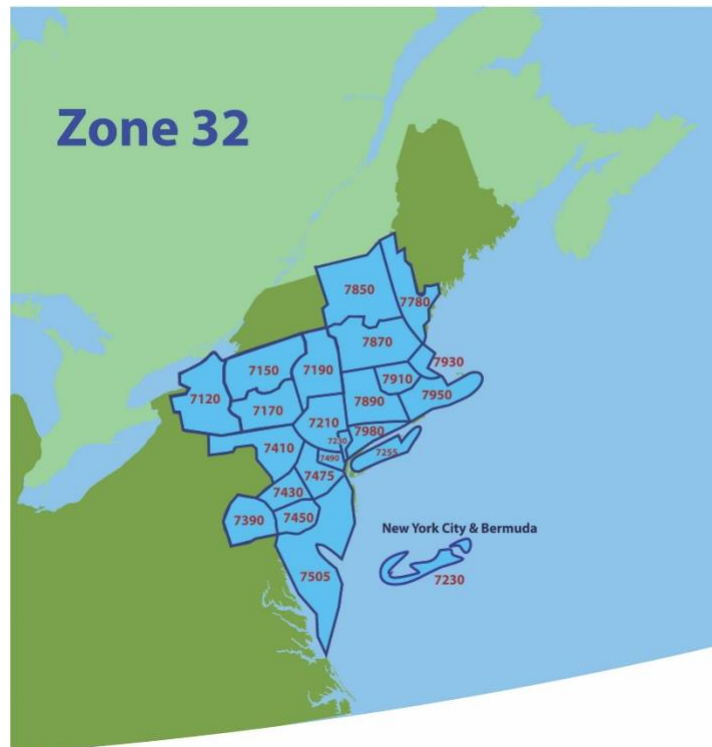
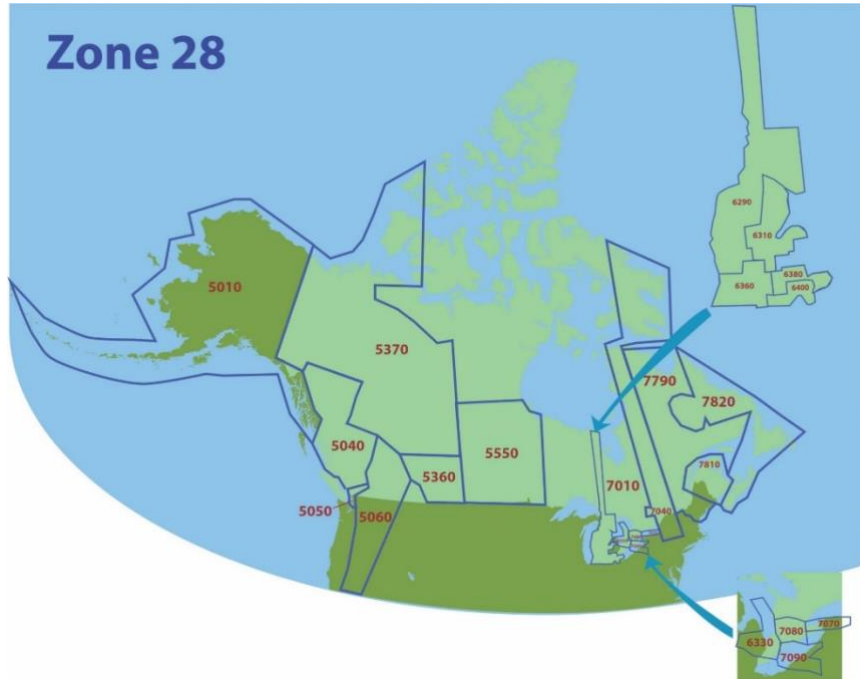
Rotary Leadership Institute-Northeast America is also a good resource.

- Each of the member districts has RLI District/Site Chair(s).
- There is **Regional Vice Chair (RVC)** who is in charge of a few districts. Find out who your RVC is.
- Visit RLINEA.ORG for more information.

Insert MRW-1: The Rotary Structure



Insert MRW - 2
Maps of Zones 28/32
Where is your district?



Insert MRW-3: Action Plan 2020 - 2025

ROTARY'S VISION STATEMENT

TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING **CHANGE**
ACROSS THE GLOBE, IN OUR COMMUNITIES, AND IN OURSELVES .

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.

To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next few years

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities or personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance structure, and processes
- Review governance to foster more diverse perspectives in decision-making

Insert MRW – 4: ROTARY’S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service.

What hasn’t changed is the need for the values that define Rotary.

FELLOWSHIP

INTEGRITY

DIVERSITY

LEADERSHIP

SERVICE

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.



[Rotary.org /action plan](https://www.rotary.org/action-plan)

Insert MRW - 5: The Object of 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:

- First.*** ***The development of acquaintance as an opportunity for service;***

- Second.*** ***High ethical standards in business and profession, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarian's occupation as an opportunity to serve society;***

- Third:*** ***The application of the ideal of service in each Rotarian's personal, business, and community life;***

- Fourth:*** ***The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.***

MRW Insert – 6 Rotary’s Five Avenues of Service

The Five Avenues of Service are the philosophical and practical framework for the work of this Rotary club.

1. **Club Service**, the first Avenue of Service, involves action a member should take within this club to help it function successfully.
2. **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 and lending their vocational skills to club-developed projects in order to address the issues and needs of society
3. **Community Service**, the third Avenue of Service, comprises varied efforts that members make, sometimes in conjunction with others, to improve the quality of life of those who live within this club’s locality or municipality by striving for **positive peace** in the community.
4. **International Service**, the fourth Avenue of Service, comprises those activities that members do to advance international understanding, goodwill, and **positive peace** by fostering acquaintance with people of other countries, their cultures, customs, accomplishments, aspirations, and problems, through reading and correspondence and through cooperation in all club activities and projects designed to help people in other lands.
5. **Youth Service**, the fifth Avenue of Service, recognizes the positive change implemented by youth and young adults through leadership development activities, involvement in community and international service projects, and exchange programs that enrich and foster **positive world peace** and cultural understanding.

Ethics and Vocational Service



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

Session Objectives

- Understand the Rotary’s Guiding Principles
- Demonstrate an appreciation of the Values we share.
- Recognize how these Values relate to them and their club.

Inserts & Online Materials

- ❖ Insert EVS -1: Guiding Principles of Rotary
- ❖ Insert EVS-2: Vocational Service Ideas Article:
- Online: The Four Way Test Means Business
https://rlifiles.com/files/resource/4_Way_Test_Means_Business.pdf
- Online: Applying the 4 Way Test.
http://rlifiles.com/resource/Applying_the_Four_Way_Test
- Online: Organizing a 4 Way Test Essay. <http://www.4waytest.org>

Session Topics

A. Rotary’s Guiding Principles

1. How do you define the following terms. Then, see how these “Rotary terms” related to each other?

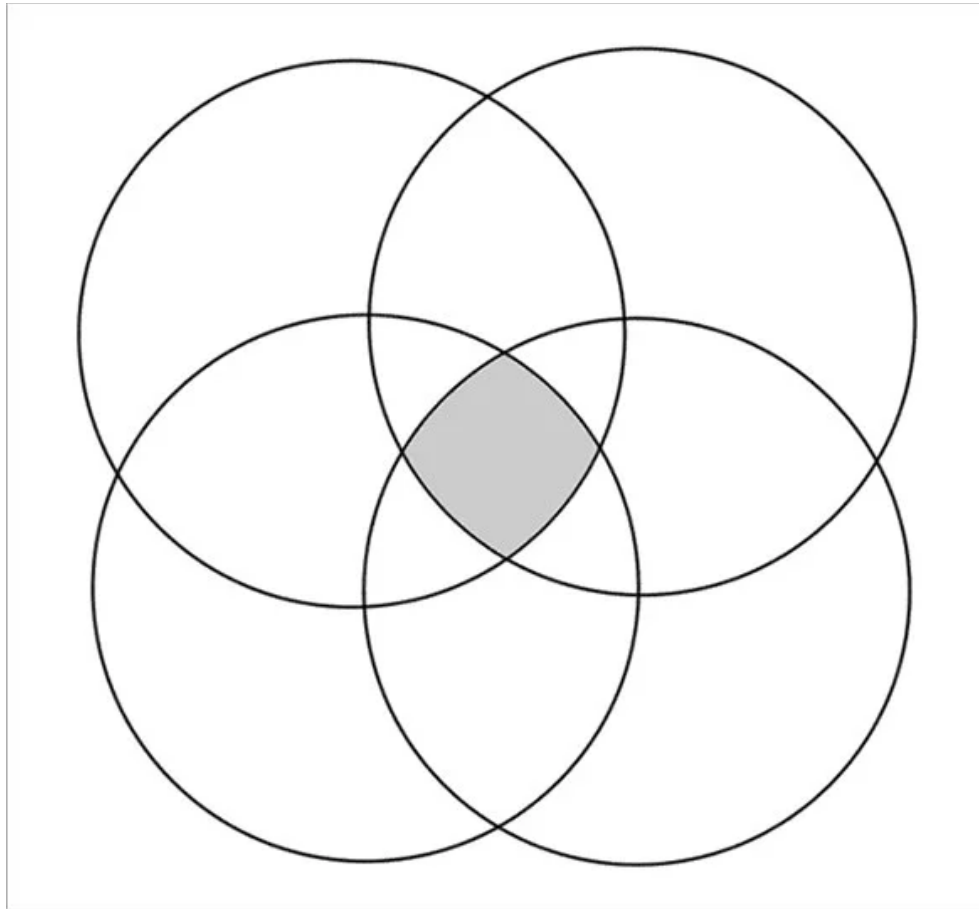
Ethics	Vocational Service
Classification	Social Responsibility

2. Exercise:

The Object of Rotary	The Five Avenues of Service
The Four Way Test	Rotary Code of Conduct

3. How do your “key words” relate to the Rotary terms defined in Session Topic #1?

4. Using the diagram below, or a similar diagram of your own, show any relationships you think may exist among the Guiding principles. - **Faculty to write the 4 Rotary Guiding Principles on each circle and ask attendees to write what values are common to all four, if any.**



5. *How do these values apply to me? My Club?*

B. Relationship of my vocation and our club service projects

1. What is Vocational Service? How does it impact me as a Rotarian?

Insert EVS-1: Guiding Principles of Rotary

The Object of Rotary

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

FIRST. The development of acquaintances as an opportunity for service;

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;

THIRD. The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

Rotary's five Avenues of Service are the philosophical and practical framework for the work of this Rotary club.

1. **Club Service**, the first Avenue of Service, involves action a member should take within this club to help it function successfully.

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5. **Youth Service**, the fifth Avenue of Service, recognizes the positive change implemented by youth and young adults through leadership development activities, involvement in community and international service projects, and exchange programs that enrich and foster **positive world peace** and cultural understanding.

The Four-Way Test "Of the things we think, say or do:

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?"

Rotary Code of Conduct

As a Rotarian, I will:

1. Act with integrity and high ethical standards in my personal and professional life.
2. Deal fairly with others and treat them and their occupations with respect.
3. Use my professional skills through Rotary to mentor young people, help those with special needs, and improve people's quality of life in my community and in the world.
4. Avoid behavior that reflects adversely on Rotary or other Rotarians.
5. Help maintain a harassment-free environment in Rotary meetings, events and activities; report any suspected harassment; and help ensure non-retaliation to those individuals that report harassment.

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 workspace and talk about it.
- c. "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
- d. Sponsor a Four Way Test essay contest.
- e. Sponsor a joint "character literacy" project for young children.
- f. Conduct a RYLA event with special emphasis on ethics.
- g. Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.

4. Recognize and promote the value of all useful occupations

- a. Make classification talks and business tours part of your club's program.
- b. Join or form a Rotary Fellowship related to your vocation.
- c. Sponsor a career day for Rotarians to bring young people to their businesses.
- d. Support professional development
- e. Encourage members to take leadership roles in business associations.
- f. Sponsor a seminar for small business entrepreneurs.
- g. Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
- h. Start a career counseling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.

5. Volunteer your vocation

- a. Mentor a young person.
- b. Use Rotary Showcase 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.

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

Session Objectives

- Understand the Basic Goals, Programs & Financing of our Rotary Foundation
- Recognize the Importance & Value of our Rotary Foundation to the Rotary Club
- Understand the importance of financial support to The Rotary Foundation.

Materials

- ❖ Insert OF - 1: Areas of Focus
- ❖ Insert OF- 2: Programs of The Rotary Foundation
- ❖ Insert OF - 3: Charity Navigator Rating
- ❖ Insert OF - 4: Donor Recognition Page <https://www.rotary.org/en/donate/recognition>
- ❖ Insert OF 5: Rotary Direct commitment form
<https://my.rotary.org/en/document/rotary-direct-rotarysrecurring-giving-program-form>
- Online: Rotary Foundation Reference Guide 219-EN (1012) <http://www.rotary.org/en/document/518>
- Online: Connect for Good (formerly Rotary Basics)
<https://www.rotary.org/myrotary/en/document/connect-good>
- Online: Rotary Learning Center www.my.rotary.org/learn

Session Topics

A. The Rotary Foundation Basics- Goals, Program, Financing

1. What is The Rotary Foundation and what does it do? How does it help you do good in the world?

2) Let's consider how The Rotary Foundation can be involved in the projects that we carry out in our clubs and districts?

B. Programs of the Rotary Foundation

1) What are the Programs of the Rotary Foundation? How do they impact on our experience as a Rotarian? On the Rotary Club?

C. Giving to TRF - Financial Support

1) How can you and your club contribute to and/or raise funds for our Rotary Foundation?

2) When you give money to our Rotary Foundation, can you designate where the funds go and for what purpose? What are the options and how do they work?

3) What incentives does our Foundation offer to enhance giving?

4) What is meant by “EREY”?

The types of giving and recognition:

TRF Giving & Recognition	Annual Fund	Annual Fund
Every Rotarian, Every Year” or “EREY” recognizes clubs that achieve an average of \$100 USD per capita giving and every dues-paying member personally contributes at least \$25 USD to the Annual Fund during the year	“Annual Fund” is TRF’s “checking account”, to be spent on programs in the third year after funds are received	“Endowment Fund” is TRF’s “savings account”, formerly the “Permanent Fund”
	Sustaining Member” or “Sustainer” recognizes a cumulative \$100 USD gift each year to the Annual Fund	“Benefactor” recognizes a cumulative \$1,000 USD gift or pledge to
“100% Paul Harris Fellow Club” is when all dues-paying club members attain PHF status	“Paul Harris Fellow” or “PHF” recognizes a cumulative \$1,000 USD gift to the Annual Fund, Polio Plus, or an approved Foundation grant	“Bequest Society” recognizes a cumulative \$10,000 USD gift or pledge to the Endowment Fund
“100% Paul Harris Society Club” is when every dues-paying club member contributes a minimum of \$1,000 USD to the Annual Fund, Polio Plus, or an approved Foundation grant	“Paul Harris Society” recognizes a cumulative \$1,000 USD gift each year to the Annual Fund, Polio Plus, or an approved Foundation grant	“Bequest Society” recognizes a cumulative \$10,000 USD gift or pledge to the Endowment Fund
No portion of your Rotary dues is required to go to TRF. All contributions are voluntary	“Polio Plus” is the program to receive funds given to TRF for the worldwide campaign to eradicate polio	“Major Donor” recognizes a cumulative \$10,000 USD gift to TRF
		“Arch Klumph Society” recognizes a cumulative \$250,000 USD gift to TRF

Additional discussions if time permits:

1) Why is the Rotary Foundation separate from Rotary International?

2) What are the benefits to Rotary, if any, to having a Rotary Foundation?

Refer to Fourth Object of Rotary

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THIRD. The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

Insert OF-1: 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:

Peace and conflict prevention/resolution



Disease prevention and treatment



Water and sanitation



Maternal and child health



Basic education and literacy



Economic and community development



Supporting the Environment



OF- 2: Programs of The Rotary Foundation

PolioPlus

Since 1988, Rotary and our partners have immunized nearly 3 billion children against polio. As of June 2020, Rotary had committed more than \$2.1 billion to global polio eradication, seeking to eliminate the wild poliovirus in the last two countries where it remains endemic and to ensure that it does not return elsewhere. In 2019-20, program awards, including PolioPlus Partners grants, totaled \$151.8 million.

Rotary Peace Centers

Each year, the Foundation supports the training of peace fellows at six Rotary Peace Centers, where they earn master's degrees or professional development certificates. Since 2002-03, 1,370 fellows from more than 110 countries have participated. In 2019-20, 69 fellows from 35 countries began their studies at the Rotary Peace Centers, and program awards for the fellows and centers totaled \$4.5 million.

District grants

District grants support small-scale, short-term projects related to the Foundation's mission. In 2021-22, the Foundation approved 478 district grants, and program awards totaled \$27 million.

Global grants

Global grants fund large-scale international activities with sustainable, measurable results that support Rotary's areas of focus. Activities include humanitarian projects, scholarships, and vocational training teams. In 2021-22, the Foundation approved 1,199 global grants, and program awards totaled \$73 million.

Disaster Response grants

Rotary's disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months. In 2021-22, the Foundation approved 207 disaster response grants, and program awards totaled \$8.0 million.

Program of Scale fund intentional effort by Rotary members, in partnership with others, to expand proven program models within our areas of focus in order to benefit more people and in more places and foster lasting change. In 2021-22, there was 1 program of Scale granted in the amount of \$1 million

Insert OF - 3: Charity Navigator Rating

Foundation receives highest rating from Charity Navigator

For the 14th consecutive year, The Rotary Foundation has received the highest rating—four stars—from Charity Navigator, an independent evaluator of charities in the U.S.

In the most recent ratings, the Foundation earned the maximum of 100 points for demonstrating both strong financial health and commitment to accountability and transparency.

In a letter to the Foundation, Charity Navigator notes that “only one percent of the charities we evaluate have received at least ten consecutive 4-star evaluations, indicating that The Rotary Foundation outperforms other charities in America. This exceptional designation from Charity Navigator sets The Rotary Foundation apart from its peers and demonstrates to the public its trustworthiness.”

The rating reflects Charity Navigator’s assessment of how the Foundation uses donations, sustains its programs and services, and practices good governance and openness.

Charity Navigator - Rating for: **The Rotary Foundation of Rotary International**

Score (out of 100) Rating		
Overall Score & Rating	99.40	
Financial	99.16	
Accountability & Transparency	100.00	

This rating was published 12/01/2020 and includes data from FY2019, the most recent 990 received at that time.

Insert OF- 4: Donor Recognitions

DONOR RECOGNITIONS

Your generous contributions to The Rotary Foundation are essential to securing and growing Rotary programs throughout the world. We recognize donors to express our gratitude for your commitment, offering individual and club recognition as well as naming opportunities that enable you to honor a friend or family member with a named or endowed gift.

Individual recognition

- **Rotary Foundation Sustaining Member**
When you give \$100 or more per year to the Annual Fund.
- **Benefactor**
When you include the Endowment Fund as a beneficiary of \$1,000 or more in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.
- **Paul Harris Fellow**
When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. Learn more about Paul Harris Fellow recognition.
- **Multiple Paul Harris Fellow**
When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.
- **Paul Harris Society member**
When you elect to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant. Learn more about the Paul Harris Society.
- **Bequest Society** When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.
 - \$10,000: Bequest Society pin and an exclusive art piece suitable for framing
 - \$25,000: Rotary's Promise crystal and named endowed fund, plus all of the above
 - \$50,000: Separate named endowed funds directed to two areas of focus or districts, plus all of the above
 - \$100,000: Customized Rotary's Promise crystal, plus all of the above
 - \$250,000: Posthumous induction into the Arch Klumph Society, plus all of the above
 - \$500,000: Special seating and registration benefits at the Rotary International Convention, plus all of the above

○ **Major Donor**

When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant. **NOTE:** Name recognition is not automatic and needs to be reported to RI staff. Recognition items commemorate giving at these levels:

- Level 1: \$10,000 to \$24,999
- Level 2: \$25,000 to \$49,999
- Level 3: \$50,000 to \$99,999
- Level 4: \$100,000 to \$249,999

○ **Arch Klumph Society**

When your cumulative donations reach \$250,000. Recognition includes an induction ceremony and your picture and biography in the Arch Klumph Society interactive gallery at the Rotary International headquarters in Evanston, Illinois, USA. You also receive invitations to society events, along with membership pins and crystals that commemorate giving at the following levels. Learn more about the Arch Klumph Society.

- Trustees Circle: \$250,000 to \$499,999
- Chair's Circle: \$500,000 to \$999,999
- Foundation Circle: \$1,000,000 to \$2,499,999
- Platinum Trustees Circle: \$2,500,000 to \$4,999,999
- Platinum Chair's Circle: \$5,000,000 to \$9,999,999
- Platinum Foundation Circle: \$10,000,000 and above

○ **Legacy Society**

When you promise a gift of \$1 million or more to the Endowment, you'll be listed in Rotary's annual report and invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special recognition items and all the benefits provided to Bequest Society members.

Club recognition

100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

100% Paul Harris Society Club

For clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus, or global grants within a Rotary year

100% Foundation Giving Club

For clubs that achieve an average of \$100 in per capita giving and 100 percent participation, with every dues-paying member contributing at least \$25 to any or all of the following during the Rotary year: Annual Fund, PolioPlus Fund, approved global grants, or Endowment Fund.

100% Rotary's Promise Club A designation provided to clubs in which every dues-paying member supports The Rotary Foundation's Endowment with a minimum commitment of \$1,000 or more in an estate plan or via an outright gift of \$1,000 or more. A certificate honoring the achievement will be provided upon request.

Every Rotarian, Every Year Club

For clubs that achieve a minimum Annual Fund contribution of \$100 per capita during the Rotary year, and every dues-paying member must personally contribute at least \$25 to the Annual Fund during the year.

Top Three Per Capita in Annual Fund Giving

For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

Naming opportunities





Special opportunities are available to create an endowment or make a directed gift in your name or the name of a loved one. Endowed gifts are invested in perpetuity, with part of their earnings spent on a designated program. Directed gifts are spent in their entirety, usually in the following Rotary year.

- **Endowed global grant fund**

- \$500,000 or more: You can specify up to three of the following: the district sponsor, the area of focus, the general geographic region of the project, or the type of grant activity, such as a project or scholarship.
- \$250,000 or more: You may choose up to two of the options listed above
- \$150,000 or more: You may choose one grant activity type, such as a humanitarian project, scholarship, or vocational training team.

- **Named endowment**

If you donate \$25,000 or more, you can direct the money to one of the following:

-  Area of Focus: funds global grants in one area of focus
-  World Fund: funds global grants in all areas of focus
-  SHARE: supports the World Fund and provides district designated funds to your district
-  Rotary Peace Centers: supports Rotary's partnership with leading universities around the world to train professionals in conflict resolution, peace studies, international relations, and related disciplines

- **Directed gift global grants**

- \$150,000: A one-time gift that provides funding for global grants in up to two areas of focus of your choice or to a special initiative of the Foundation, such as WASH in Schools
- \$30,000: A one-time gift that provides your district with funds for one or more global grants in an area of focus of your choice
- \$15,000: A one-time gift that provides funding for a global grant in an area of focus of your choice without specifying the district that will sponsor the grant

- **Rotary Peace Centers endowment opportunities**

- \$1.5 million: Endows a Rotary Peace fellow every year
- \$1 million: Endows a Rotary Peace fellow every two years
- \$1 million: Endows a visiting lecturer every year
- \$750,000: Endows a Rotary Peace fellow every three years
- \$500,000: Endows a Rotary Peace fellow every four years
- \$250,000: Endows one Rotary Peace certificate fellow every year
- \$100,000: Endows an annual seminar at a Rotary Peace Center
- \$25,000 and up: Provides general support

- **Rotary Peace Centers directed gifts**

- \$75,000: Provides funding for a Rotary Peace Fellow to complete a two-year master's degree program
- \$75,000: Provides funding for up to 10 internships or research projects for peace fellows
- \$60,000: Provides funding for five fellows enrolled in the three-month professional development certificate program
- \$10,000: Provides general support

- **Rotary Peace Symposium directed gifts**

- \$400,000-\$500,000: Underwrites the cost of the Peace Symposium
- \$50,000-\$100,000: Provides full funding for a donor-specified element of the peace symposium (speakers, Rotary Peace Fellow travel, etc.)
- \$10,000-\$25,000: Provides funding for a hosted reception connected to the Peace Symposium
- \$10,000 and up: Provides general support for the Peace Symposium

- **Entrepreneurial named gift for peace**

- \$75,000-\$1 million: Funds new opportunities within Rotary's peace programs for global grants and the Rotary Peace Centers, such as workshops and retreats, and other initiatives.

Engaging Members

I make my club and Rotary stronger by my active participation.



Session Objectives

Explore the value and options of engaging our members

Materials

- ❖ Insert EM-1: Sample Membership Satisfaction Survey (RI)
- ❖ Insert EM-2: Ideas: Delivering Value - Keeping Rotarians
- ❖ Insert EM-3: 12 Point Plan for Membership Engagement
- Online: Expanded Membership Satisfaction Survey. <http://my.rotary.org/en/document/enhancing-club-experience-member-satisfaction-survey>
- Online: Introduction to New Members: Guide to Orientation <http://my.rotary.org/en/document/orientation> guide
- Online: Creating Your Membership Development Plan <https://www.rotary.org/myrotary/en/document/strengthening-yourmembership-creating-your-membership-development-plan>
- Online: Club Assessment Tools <https://my.rotary.org/en/document/membership-assessment-tools>
- Online: Membership Page at www.rotary.org www.rotary.org/myrotary/en/learning-reference/learn-topic/membership

Session Topics

A. New Members- Orientation/Onboarding, Early-on Engagement

- 1) How will orientation/onboarding of the new member help in engaging that member?

- 2) Why are you in your Rotary club?

- 3) What keeps you in your Rotary club?

B. Strategies to engage Rotary Club members

1. Describe different ways of engaging members- both new and long-term members.

2. Use of surveys

How could a Member survey be helpful in engaging members?

3. Fourteen-Point Plan for Member Engagement.

4. How do service projects contribute to increased member engagement?

“Plan projects that pack a punch”. “Don’t forget fun”. - Rotary magazine August 2023

Insert EM-1: Membership Satisfaction Survey (3 pages)

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

Do you feel comfortable in our Rotary club? Yes No

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

- Compare 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"/>
Membership 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	_____	_____
Member orientation and education	_____	_____
Local service projects	_____	_____
International service projects	_____	_____
Club public relations	_____	_____
Fundraising	_____	_____
The Rotary Foundation	_____	_____
Fellowship	_____	_____
Other: _____		

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	_____	_____
Weekly meetings	_____	_____
Club fines/assessments	_____	_____
Voluntary contributions to service projects	_____	_____
Voluntary contributions to The Rotary Foundation	_____	_____

	Excellent	Adequate	Insufficient
Amount of Rotary content	_____	_____	_____
Length	_____	_____	_____
Program organizations	_____	_____	_____
Time for fellowship	_____	_____	_____
Networking opportunity	_____	_____	_____

	Convenient	Inconvenient
Location	_____	_____
Meeting 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 fellowships activities?

- Excessive
- Adequate
- Insufficient

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

- Excessive
- Adequate
- Insufficient

Which of the following words would you use to describe our club website/newsletter?

(Check all that apply)

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

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

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

- 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
- Thanks Rotary is too expensive

Insert EM-2: Engagement Ideas: Delivering Value - Keeping Rotarians!

Define and describe how each of these promote member engagement

<p>Pair bonding. Pairing new member with more experienced member</p>	<p>A Minute in the Life . Regularly ask members to talk about their profession or other aspects of their life. 50 second speech.</p>
<p>Web-connected. The names of every Rotarian is in the website, with their profession listed.</p>	<p>RLI Posse. Encourage new members to attend RLI with their fees taken care of.</p>
<p>Party Time. Organize social event regularly.</p>	<p>Adopt-A-Class. Check with local school for children’s needs of a given class and adopt the class.</p>
<p>“Flash mob” Project. Video or photograph members while on a service project or event and publish.</p>	<p>Career-share. Organize/sponsor a Career Fair</p>
<p>How do you Interact? If clubs is not sponsoring an Interact, start one.</p>	<p>Fun Committee. Create a committee that will organize fun activities.</p>

Ask for other ideas.

Insert EM-3: Fourteen-Point Plan for Member Engagement

- 1. Provide Pre-Induction Orientation/On-boarding Program**
- 2. Develop a Mentor & Education Program**
- 3. Conduct a Reception for New Members**
- 4. Assign a Job – Greeter, cashier, etc.**
- 5. Set up a Member Services Committee**
- 5. Advocate New Member Opportunities**
- 7. Log New Member Activities the first year**
- 8. Recognize on-going & immediate**
- 9. Connect with members, do an interview, a survey, have coffee time with a member(s)**
- 10. Provide Networking & Professional Development Opportunities**
- 11. Measure & Examine Club's History of Engagement and Member Retention Rate**
- 12. Spot Danger Signs and Remedy Engagement Problems**
- 13. Be Innovative – Highlight the Reasons We Stay in Rotary**
- 14. On a regular basis, review how members are feeling about the club service projects and/or social events. Get their feedback.**

Creating Service Projects



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

Session Objectives

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
- Online: Tips to a Successful Project <https://www.rotary.org/en/ips-successful-rotary-project>
- Online: Community Assessment Tools. 605C-EN (1006)
<http://my-cms.rotary.org/en/document/community-assesemnt-tools>
- Online: The Rotary Foundation's 7 Areas of Focus 965-EN <https://www.rotary.org/en/our-causes>

Session Topics

A. Planning and Implementing a Service Project.

- 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.

 - 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 you Club finance the project?

2) Develop a Business Plan for your Service project. Consider the factors discussed on Question !.

B. Project Evaluation

1) How will you evaluate the success or lack of success of the project? At what point do you do evaluation of the project?

2) Review the plan for creative, “outside the box” alternatives or changes to the project. How could you make it “bigger, better, bolder?”

C. 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 fundraising projects?

d. Share fundraising ideas

SUMMARY

Good Rotary Service projects require:

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

Insert SP-1: Service Project Questions

1. What is the project about? How was the need identified?
2. What can our Rotary club do to help?
2. What can our Rotarians do “hands on” to help?
3. How much funding is required? What Fundraising event should the Club have?
4. How can the project be designed? Who will develop the Plan? What is needed?
5. How do we achieve club/member buy-in?
6. Will the project generate good publicity for the club? Who will and how do we do publicity?
7. Is this a one-year project or a continuing project?
8. What other community resources are available or what other organizations could be involved?
9. What are the steps necessary to move forward? Need a Business Plan?

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. What can your Rotary club do to help third graders become better readers?

My Leadership In Rotary



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

Session Objectives

- Describe the characteristics of an effective Leader
- Examine the different leadership styles and identify their own style
- Discuss what motivates people in volunteers or civic organizations

Inserts & Materials:

- **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

Session Topics

A. Characteristics of an Effective Leader

1. List the characteristics of an effective leader. Which characteristics do you think are most important?

B. Leadership Styles

Leadership style may differ by culture and generation.

Here are 5 Leadership styles. Define each.

- Participative
- Situational
- Transactional
- Transformational
- Servant

C. Differentiating leaders from business environment and volunteer organizations

1. What is the difference between leadership in a business and leadership in Rotary? What is the role of a “leader” in Rotary
2. What motivates someone to excel in the workplace? What motivates someone to excel in a Rotary Club?
3. 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.
4. What differentiates a strong/effective leader from a weak leader?
5. Are good leaders born or can leadership be taught?

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.**

In Part II under the **Team Building** session, there will be further discussion on qualities and characteristics of volunteer leadership.

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 Part II NOW!!!