



2023-2024

PARTICIPANT – PART III

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 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 website 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 III – MY ROTARY JOURNEY

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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.

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.rlinea.org

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Course Evaluation	

Strategic Planning

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



Session Objectives

- Understand the Value of and Process for Strategic/Action Planning
- Gain knowledge and skill on how to analyze my Rotary Club
- Identify possible areas needing improvement & specific solutions for improvements

Materials

- ❖ Insert SPA-1: Strategic Planning Guide.
- ❖ Insert SPA-2: Rotary Club Self-Evaluation of Performance & Operations Rotary Club Central
- ❖ Insert SPA-3: Action Plan 2020-25 <https://my.rotary.org/en/document/action-plan-brochure>
- Online: Rotary Club Central <https://www.rotary.org/myrotary/en/secure/13301>
- Online: Club Health Check <https://my-cms.rotary.org/en/document/rotary-club-health-check>

Session Topics

The focus is not to detail the process in full but rather to focus on the major components of the process.

A. Strategic Planning- What is it? Why 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?

2. What is the process of creating a strategic plan/Action Plan?

Strategic Planning Process Overview

Phase 1 - Determine your Club status. How is our club now?	Phase 2 – Develop your vision. What do you like your club to be like?	Phase 3 – Make a plan. How can you achieve your vision?	Phase 4 - Track Progress. How close are you to your goals?
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3. Is board, club, or key member “buy-in” important? Why?

4. Can the plan be changed? How often does the plan need to be reviewed? How?

5. What is your Rotary club's "brand" or "distinctive position" in your community? How do you define your club's brand? Is it different than the "brand" of Rotary International? Is defining your club's "brand" important for strategic planning?

6. Rotary International has an International Strategic Plan, currently referred to as Rotary international Action Plan.

7. Does your Club have a Strategic Plan? What is the primary focus- Membership, Public Image, etc ?How often is it reviewed?

8. Why is an analysis by a Rotary club important for the club? Why is it an important exercise for the Rotarians within the club?

B. Strategic/Action Planning- The "HOW TO" of Strategic Planning.

1. Class Exercise: Complete the survey, as directed.

2. After completing the Self-Evaluation, what areas needing improvement are apparent? Are these areas specific to your club, or do they have a wider application to other Rotary clubs? Suggest ways to improve the areas.

3. What was your reaction to the survey?

4. After completing this exercise, share how you will share with your club the value of strategic/action planning?

“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 Giay,
Address to 1996 Rotary convention
Calgary, Alberta Canada**

Insert SPA-1

Strategic Planning Guide

<https://my-cms.rotary.org/en/document-strategic-planning-guide>

See how your club’s goals reflect those of your district and Rotary International’s strategic plan? Typically, Rotary clubs with a strategic plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help you set long-term priorities and goals, all of which will support your club’s vision. It’s designed for Rotary clubs, but districts can use it too. As you prepare a strategic plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan’s development and use.
- Ask an unbiased facilitator to run strategic planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club’s goals reflect those of your district and Rotary’s strategic plan.

Strategic Planning Worksheet

1. How is your club doing? Determine your Club’s current status

- Identify strategic issues to address
- Determine club’s strengths and weaknesses
- Assess member satisfaction and needs
- Identify opportunities and challenges in the community

When checking your club’s current state, use Rotary Club Central, Rotary Club Health Check, Membership Assessment

Tools, and your region’s version of Be A Vibrant Club to see what your club is doing well and what it could improve.

<u>Club strengths</u>	<u>Club weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>

2. What do you want your club to be like? Develop a Vision

- List five to seven characteristics you want your club to have
- Create a vision statement

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community — e.g.,

“Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)

Vision Statement “ _____ ”

3. How can you achieve your vision? Make a plan.

- Set strategic priorities
- Set annual goals
- List the activities, timeline, and resources you’ll need

In setting your strategic priorities, consider:

- The club’s strengths and weaknesses
- The Priorities of RI’s Plan of Action)
- Programs and missions of Rotary International and The Rotary Foundation
- Your community’s opportunities and challenges
- Members’ opinions - Get the team to choose the most important strategic priorities
- Achievability in three to five years
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.

4. How close are you to your goals? Track progress toward your goals

- Monitor progress toward your annual goals
- If you missed your targets, determine why
- Adjust your action plans

You’ll need to track progress toward your annual goals with your strategic planning team and suggest changes to action plans if needed. You may want to try a new approach or allocate more resources to your goals.

Consider the following when monitoring progress:

- Allot enough resources to achieve the plan.
- List steps that your club should take to track its strategic plan, including a timeline and key performance indicators (KPI) — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.
- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?

Strategic Planning Worksheet (cont'd).

Strategic priority 1: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 2: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 3: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

4. How are you doing?

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.
- List steps that your club should take to track its strategic plan, including a timeline and key performance indicators (KPI) — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.

Insert SPA-2 (8 pages)

Rotary Club Self-Evaluation of Performance and Operations

<https://my.rotary.org/en/document/rotary-club-health-check>

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.

Items	Score
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 Rotary 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, lags, 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 attend 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 or VTT team member, a global scholar or a peace scholar

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.

Insert SPA – 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

Foundation III: International Service

As I further my Rotary journey, our Rotary Foundation affords me a greater opportunity to serve the world community.



Session Objectives

- Learn about opportunities for international service
- Utilize my vocational skills on completing international projects
- Learn how Rotarian Action Groups may broaden our service
- Explore ideas for international service

Materials

- Insert IS-1: What is an International Service Project?
- Insert IS- 2: Bringing It Together in International Service
- Insert Is -3 : Rotarian Action Groups by Area of Focus
- Insert IS -4: Grant Model Flowchart
- Insert IS- 5: Sample Exemplary Global Grants
- Online: Developing Effective Projects <https://my.rotary.org/en/take-action/develop-projects/developing-effective-projects>
- Online: Rotary Showcase Search http://map.rotary.org/en/project/pages/project_showcase.aspx/
- Online: Rotary Friendship Exchange Handbook (909) <https://www.rotary.org/myrotary/en/document/146976>
- Online: Guide to Global Grants 1000-EN (1015) <https://my.rotary.org/en/document/guide-global-grants>

Session Topics

A. International Service- What is it? How might it be funded?

- 1) What is International Service?

2. How do Rotary Clubs find these projects?

3) A Rotarian, while traveling internationally, visited a club and became interested in helping with a problem in the community she was visiting. After obtaining the local Rotary club's commitment to address that problem, how should the Rotarian proceed in asking her/his Rotary Club for support? How can her/his Rotary Club proceed to bring the project to fruition?

4) How can we utilize our vocational skills in international service?

B. Global Grants

Global grants support large international activities with sustainable, measurable outcomes in Rotary's [Areas of Focus](#). By working together to respond to real community needs, clubs and districts strengthen their global partnerships.

Global Grant Exercise—The class will engage in the process of creating an International Global Grant project, including the funding flow.

Insert IS-1: What is an International Service Project?

International Service Projects aim to:

1. Improve the quality of life of those in need through international service
2. Encourage cooperation between clubs and districts in different countries as they carry out international service projects
3. Provide an effective framework for exchanging information regarding project needs and assistance
4. Increase awareness among Rotarians of International development and cultural issues as well as the importance of implementing projects that help people help themselves
5. Assist participants in related programs of Rotary International and The Rotary Foundation
6. Communicate successful project experiences to other Rotarians
7. Foster **international understanding, goodwill, and peace**

Global Grant projects must adhere to specific criteria.

Visit the Grant Center at www.rotary.org.

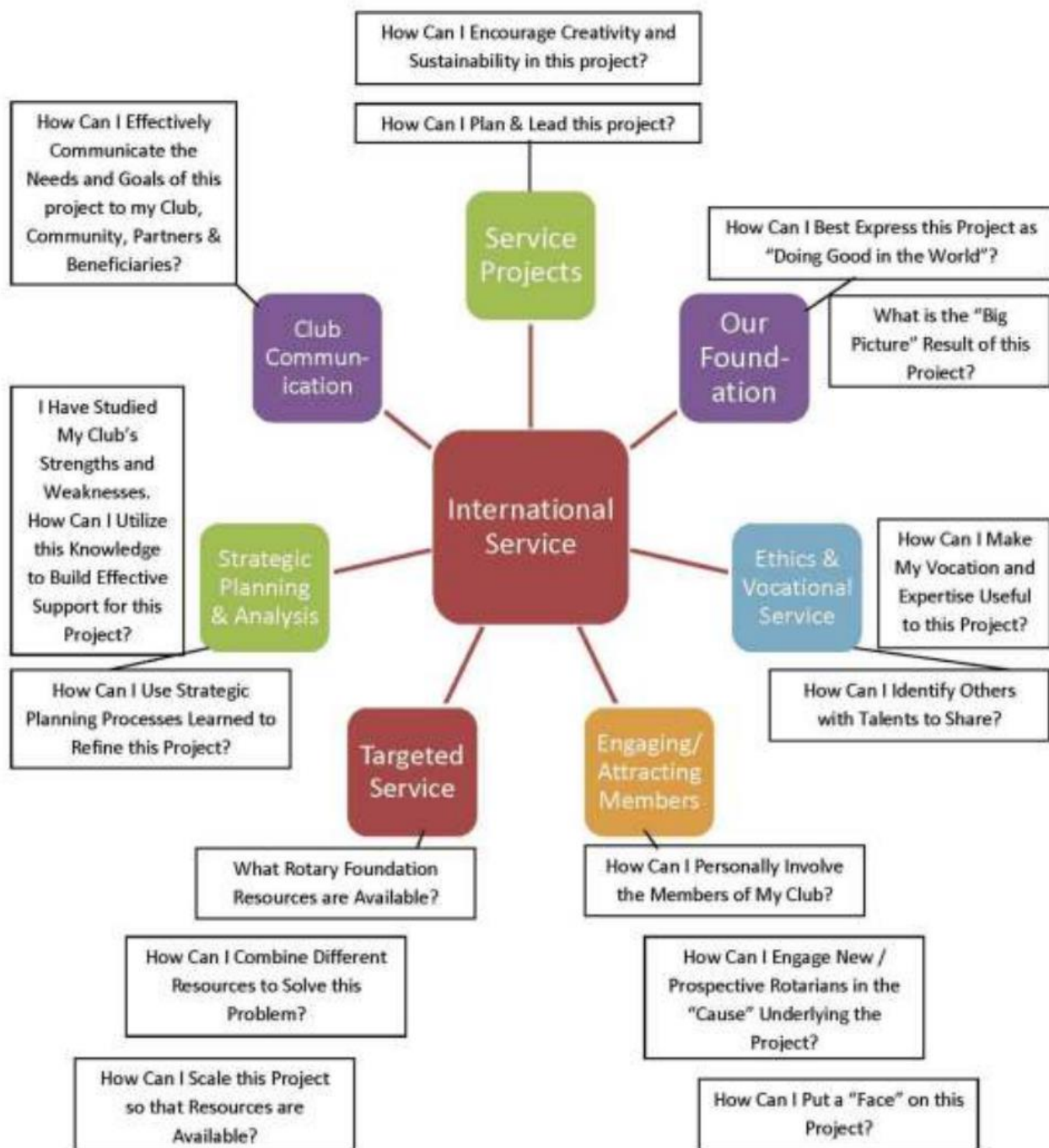
Getting Involved

Rotary clubs that get involved find that a project's benefits extend far beyond the communities where their projects take place. Clubs have the opportunity to-

- (1) Undertake more ambitious projects
- (2) Empower all participants in service efforts
- (3) Develop closer ties with Rotarians abroad
- (4) Further international understanding and goodwill AND,
- (5) Address global concerns

Many clubs start participating in International Service Projects because of **informal contacts** among Rotarians. **Rotary Showcase** (http://map.rotary.org/en/project/pages/project_showcase.aspx/) is another way Rotarians can get involved in International Service. This searchable database lists hundreds of Rotary clubs and district community service projects worldwide that are in need of funding, volunteers, donated goods, and partners for Rotary Foundation Grants. It also offers a list of model projects, which can be a source of best practices.

Insert IS-2: Bringing It Together in International Service



Insert IS -3: Rotarian Action Groups by Area of Focus

Rotary Action Groups are independent, Rotary-affiliated groups made up of people from around the world who are experts in a particular field, such as economic development, peace, addiction prevention, the environment, or water.

Action groups offer their technical expertise and support to help clubs plan and implement projects to increase our impact, one of Rotary's strategic priorities. This support includes helping clubs find partners, funding, and other resources. Action groups can also help clubs and districts prepare grant applications, conduct community assessments, and develop plans to monitor and evaluate their projects. Read more about these activities in the [Rotary Action Groups annual report](#).

Anyone who wants to share their expertise to make a positive difference can join an action group. Only Rotarians, Rotaractors, and Rotary Peace Fellows can serve in leadership roles.

Rotary Action Groups by area of focus

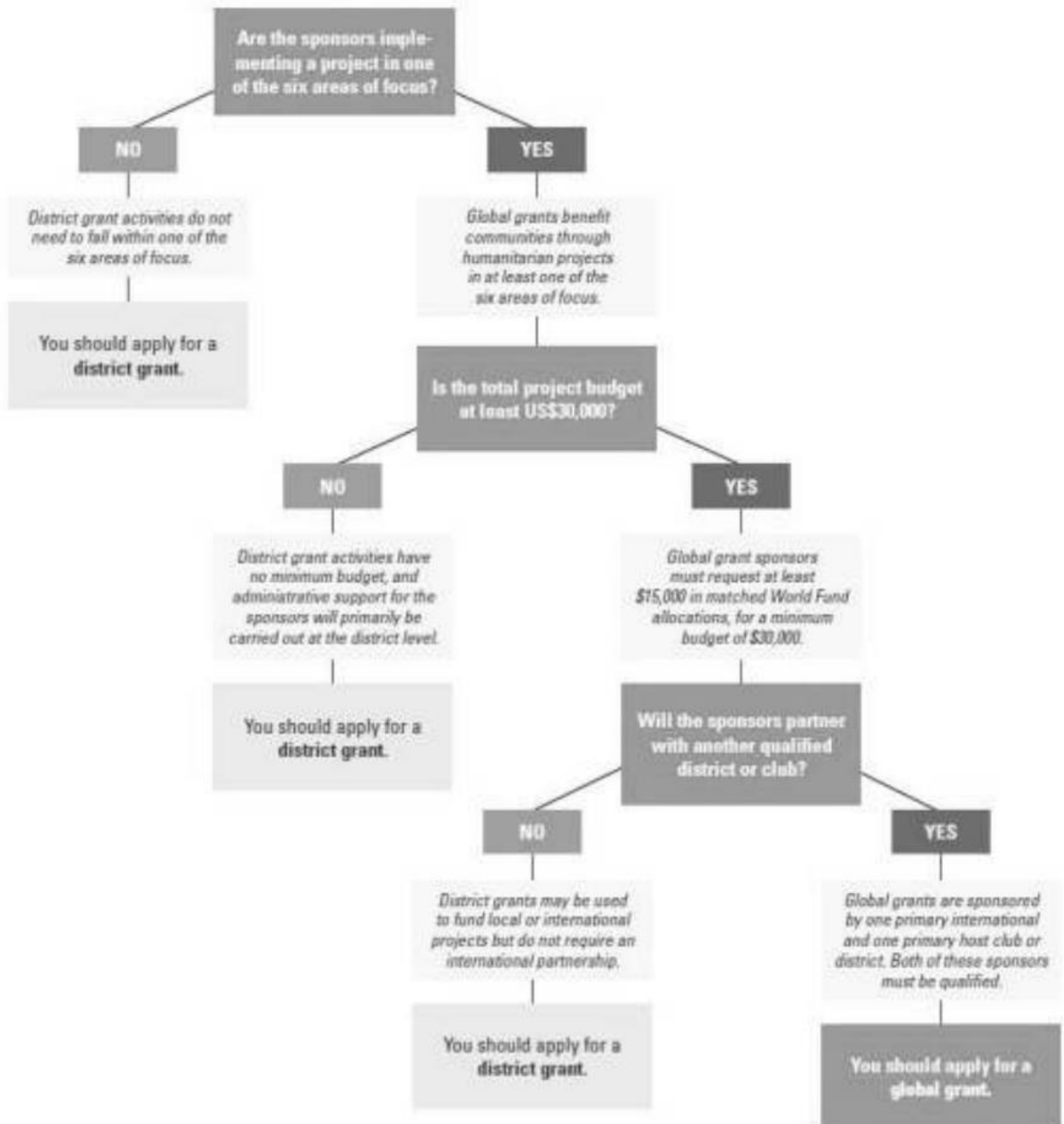
Promoting Peace	Fighting Disease	Providing clean water & sanitation
Peace Refugees Slavery Prevention	Addiction Prevention Alzheimer's/Dementia Blindness Prevention Blood, Tissue, and Organ Donation Diabetes Family Health/AIDS Prevention Health Education and Wellness Hearing Hepatitis Eradication Malaria Mental Health Initiatives Multiple Sclerosis	Menstrual Health and Hygiene Water, Sanitation and Hygiene
Saving mothers & children	Supporting education	Growing local economies
Clubfoot Reproductive Maternal and Child Health	Basic Education and Literacy	Community Economic Development Disaster Assistance
Protecting the Environment		
Endangered Species Environmental Sustainability		
Action groups that work in more than one area of focus		
Food Plant Solutions		

Insert IS-4

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.



Insert IS - 5

Exemplary Global Grant Projects

Global Grants that exemplify what a project should be a sustainable endeavor that aligns with one of Rotary's areas of focus and that is designed in cooperation with the community to address a real need. These noteworthy projects demonstrate how your club can leverage the resources of the Foundation to do good in the world.

1. Equipping a neonatal intensive care unit in Brazil

Area of focus: Saving mothers and children

Host sponsor: Rotary Club of Registro, Brazil

International sponsor: Rotary Club of Nakatsugawa, Japan

Total budget: \$172,500

Background: Neonatal mortality rates were significantly higher in the Ribeira Valley area of southern São Paulo state than in other regions.

Scope: The Rotarians worked with the Hospital Regional Dr. Leopoldo Bevilacqua in Pariquera-Açu to determine the best approach. The grant provided equipment for the hospital's neonatal ICU and provided prenatal care and breast-feeding workshops for pregnant adolescents.

Impact: Infant mortality in the region has been halved to seven per 1,000 live births.

2. Training young community leaders in Guatemala

Area of focus: Promoting peace

Host sponsor: Rotary Club of Valle de Guatemala, Guatemala

International sponsor: Rotary Club of Manhattan Beach, California, USA

Total budget: \$39,873

Background: Students attending overcrowded schools in poverty-stricken areas of Guatemala face bullying and street violence. Crimes stemming from gang and drug activity are common.

Scope: Project sponsors worked with Alianza Joven, a Guatemalan organization focused on preventing crime and violence, to train students in four municipalities around Guatemala City on techniques for deflecting aggressiveness, strengthening leadership, making decisions, and serving their communities. Teachers, principals, and parents were involved.

Impact: More than 6,500 teachers and students received training.

Fun fact: The project sponsors connected at a project fair in Antigua, Guatemala.

3. Improving sanitation and hygiene training in Benin

Area of focus: Providing clean water

Host sponsor: Rotary Club of Abomey-Calavi, Benin

International sponsor: District 2080 (Italy)

Total budget: \$158,999 **Background:** The village of Paouignan needed improved clean water infrastructure.

Scope: The Rotarians provided a new well and water tower and 10 new taps, repaired seven older taps, and provided hygiene training in Paouignan.

Impact: Improved water access and sanitation practices benefited 17,000 people.

Fun fact: This grant was part of the Future Vision Pilot. The sponsoring clubs understood the Foundation's desire for sustainable projects and created the hygiene component of the grant before any training documents were available. The grant sponsors communicated in three languages while carrying out this project.

4. Improving literacy in Guatemala

Area of focus: Supporting education

Host sponsor: Rotary Club of Guatemala Vista Hermosa, Guatemala

International sponsor: Rotary Club of Summit County (Frisco), Colorado, USA

Total budget: \$339,191

Background: The Guatemala Literacy Project is a 20-year partnership between Rotary clubs and districts and the nonprofit Cooperative for Education. **Scope:** This global grant provided textbooks, computer labs, teacher training, and scholarships to impoverished schools. The sustainable model requires families to pay a fee to rent the donated textbooks; schools use the money to buy new books when the old ones wear out.

Impact: This grant served 5,880 students and trained 337 teachers. First-graders in the program scored 71 percent higher than the national average in letter naming.

Fun fact: More than 500 Rotary clubs have participated in the Guatemala Literacy Project over the past 20 years.

5. Providing equipment for indigenous farmers in Paraguay

Area of focus: Growing local economies

Host sponsor: Rotary Club of Asunción, Paraguay

International sponsor: Rotary Club of Flensburg, Germany

Total budget: \$52,500 **Background:** Indigenous residents of the village of El Paraiso, 300 miles north of the capital, Asunción, relied on subsistence farming.

Scope: The Rotarians provided agricultural equipment – a tractor, plow, and harrow – and worked with an organization that provides vocational training to the village chiefs and makes regular visits to the village to monitor progress.

Impact: Two weeks after the launch of the project, the villagers planted 500 acres of sesame.

Public Image and Public Relations

As I further my Rotary journey, I will identify opportunities to promote the image of my club and Rotary to the benefit of my community and world



Session Objectives

- Discuss Public Image and Publicity as it relates to Rotary and my membership and club
- Explore how my club can benefit from a Public Relations Strategy
- Identify my club's target audience and how we can effectively reach it
- Explore ways to enhance our Rotary Club's Public Image

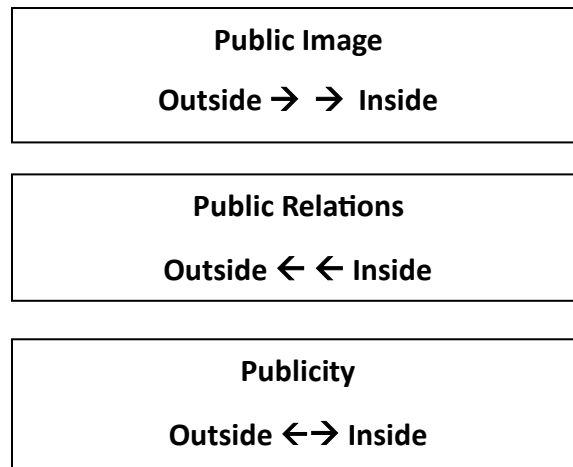
Materials

- ❖ Insert PIPR-1: Public Relations Case Study
- ❖ Insert PIPR-2: Public Relations Writing
- ❖ Inline: Visual Identity Guide (Login required)
<https://my.rotary.org/en/rotary-identity-guidelines>
- ❖ Online: Rotary Logos (Login required) <https://brandcenter.rotary.org/en-us>

Session Topics

A. Differentiating Publicity, Public Relations, Public Image

1) What is the difference between Publicity, Public Relations, and Public Image? Which one might we have more control over?



2) Who is the club's target Audience?

.

B. Building Public Relations/Public Image

1) Case Study PIPR-1

2) Name some tools for internal and external communication? Flip chart ideas:

3) Is there something about your club that the community recognizes? Is it different from the Rotary International brand?

.

4) In many communities, few people even know a Rotary Club exists. How can your clubs do better at public relations?

5) Does your club have a PR chairperson? What is their role? Is there a PR strategy? Are projects and activities designed with PR in mind? How can club members be part of the PR strategy?



Insert PIPR-1: Public Relations Case Study

Read the following case study and create a public relations plan for the Rotary Club of Royal Gardens. Focus on three or four ways the club can reach out to the media and to the community directly to share its projects. Consider the questions below as you develop your plan.

The Rotary Club of Royal Gardens is located in a prosperous town of 35,000. The club's 40 members are a cross-section of the Royal Gardens professional community. The club's longest-running and most successful service project provides support for the community's growing elderly population. Through this ongoing project, club members prepare and deliver meals, arrange for home repairs, and visit hospitals.

The club also works with local schools to identify a candidate who is selected by the district to receive a Rotary Foundation Global Scholarship. One scholar is studying the effects of global warming on ocean water levels and corresponds regularly with the club to inform members of her experiences.

The club's weekly program attracts prominent local speakers who talk about important issues facing the community. Attendance is high, and members are enthusiastic.

An informal survey was conducted by the club, and it revealed that few people in the community are aware of the club's efforts. Some respondents reported they perceive Rotary as a social club for older men.

Several members have complained about the difficulty of attracting new members as well as the lack of recognition the club receives for its service to the community. The club's activities have received no media coverage for the past five years.

1. How can the club provide basic information about Rotary International and the club to the media?
2. What aspects of the club's current activities might interest the media? Which type of media is most appropriate for each aspect? Why?
3. How might club programs be of interest to local media?
4. How can the club reach prospective members directly to inform them of its projects and membership opportunities?

Insert PIPR-2: Public Relations Writing

The ability to write easily, logically, and succinctly is essential for public relations. The object of most PR writing is to grab the reader's attention, convey information quickly, and invite the media to cover your story.

Inverted pyramid. Most press releases and other written communications for the media use an inverted-pyramid style, with the most important and relevant information at the top, followed by gradually less important information. The headline and the first sentence are the two most important parts of a press release. Make sure they're compelling enough to draw in the editor or reporter.

The five W's. Include the five W's in your first paragraph, ideally in the first sentence:

- **Who?** The main focus of your story; a person or group at the center of the story
- **What?** The event or project with which your club is involved
- **Where?** The location of the event, including a street address
- **When?** The time, day, and date of an event, or the time period involved for a person or project
- **Why?** The reason the event, person, or project is significant to the general public

In subsequent paragraphs, provide details about the event or project, or describe how the person or group achieved something extraordinary. Beyond the press release. Rotarians can communicate stories to the media in many other ways, such as:

- **Media alerts.** Time-crunched newsrooms appreciate a media alert, a more condensed version of a press release. Ideal for upcoming events or reminders, just answer the five W's in bullet format, and send the alert to media contacts.
- **Letters to the editor.** The editorial page is one of the most-read sections of the newspaper, and a letter can reach many people. Use the templates from RI to get started.
- **Op-eds.** An op-ed is an opinion piece written by an individual who isn't on the newspaper's staff. Before writing an op-ed for your paper, learn what topics are of interest to your community.
- **Media kits.** Prepare a special folder that holds general information about Rotary and your club as well as materials tailored to the event.
- **Fact sheets.** Fact sheets provide details about Rotary programs to ensure that journalists have accurate background information.

Excerpted from www.Rotary.org

Building A Stronger Club

As I further my Rotary journey I can assist in delivering on Rotary's promise.



Session Objectives

- Examine the varying expectations of Rotary
- Explore the consequences of met and unmet expectations
- Know how I can assist in delivering on Rotary's promise

Materials

- Insert BSC-1: Guiding Principles of Rotary
- Insert BSC-2: Expectation & Delivery Exercise
- Online: Be a Vibrant Club <https://my-cms.rotary.org/endocument/be-vibrant-club-your-club-leadership-plan-north-america>

Session Topics:

A. Rotary's Promise

- 1) What is meant by Rotary's promise? What do we promise? To whom? Discuss.

B. Expectations – of club members and of the club

1. Does your Rotary club set expectations with its target audience about membership in the club
How?
Does this differ for current members and prospective members?
Does it differ based on age, position in the workforce or retirement status?
Does it differ by constituencies or groups within and outside the club?
2. What type of specific or general expectations are set, if any, in your club? Discuss this issue for one of the groups identified in the prior question and complete the Expectation and Delivery Exercise.
3. Consider how your club might meet these expectations through each of the Five Avenues of Service.
What is my role in doing this?
4. Is there a discussion between what is promised and what is delivered?
5. List three activities that my club may realistically do to meet the expectations of one group that is important to your club.
6. In light of this discussion, how can you make your club stronger?

Insert BSC-1: Guiding Principles of Rotary

Guiding principles These principles have been developed over the years to provide Rotarians with a strong, common purpose and direction. They serve as a foundation for our relationships with each other and the action we take in the world.

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.

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.

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.

Making a Difference

As I further my Rotary journey, I will help assess my own experience and growth through RLI and help improve the path for others to follow



Session Objectives

Examine how I can, as an RLI Participant, contribute to improving the RLI experience for others

Ensure that use the ideas raised at RLI to improve my Rotary club ,other groups in my civic, social or business life

From my experience, I will help to analyze the strengths and weaknesses of the RLI program, and make some specific suggestions for improvement

Materials

Insert MD -1: RLI Courses

Insert MD -2: My RLI Personal Action Plan?

Session Topics

A. Rotary Leadership Institute (RLI)- what is it? What are the benefits of attending RLI?

1. What does RLI mean to you?

2. Which RLI sessions were memorable to you individually, and why?

B. The impact of RLI in my Rotary experience

1. How has RLI made a difference in my Rotary life and subsequently to my Rotary club?
If no impact, what changes could be done to enhance RLI toward making a difference in your Rotary experience and in your Rotary club?

2. What are some of the issues facing Rotary and your Rotary Club that can be improved through the use of ideas, skills or techniques learned through RLI classes?

3. Have you had an opportunity to use any of the specific leadership skills in an environment other than your Rotary club; i.e., at work, other civic or volunteer endeavors?

4. What activities are most effective at getting across the goals of the session? In what ways?

5. What changes would you make to RLI materials, presentation methods, order of courses, venues, or any other aspect(s), in order to improve the RLI experience for others?

6. What have you taken away from your RLI experience?

7. Complete the Personal Action Plan.

CONGRATULATIONS, GRADUATES!

Want more? RLI has a Graduate program with courses on specific topics just for graduates! Visit **RLINEA.ORG** for more information on current course offerings.

“Rotary is blessed with members of high quality, but all Rotary clubs depend on outstanding leadership to harness the talents and skills of our membership to high levels of accomplishment.

The annual change of club presidents and other club officers places great pressure on our clubs to maintain a high level of leadership every year.

Only through excellent education in Rotary and leadership skills can we develop the quality leadership we need to keep Rotary in the forefront of world service organizations.”

Past RI Director & RLI Founder

David Linett

Insert MD-1 RLI Undergraduate Courses

	RLI CURRICULUM
PART I	My Rotary World My Leadership In Rotary Ethics and Vocational Service Foundation I: Our Foundation Engaging Members Creating Service Projects
PART II	Rotary Opportunities Effective Leadership Strategies Club Communication Team Building Foundation II: Targeted Services
PART III	Strategic Planning Foundation III: International Service Public Image & Public Relations Building a Stronger Club Making a Difference

Insert MD-2: My RLI Personal Action Plan

Goal: Here is one thing I plan to do differently as a result of this training.

SMART Objective: _____

S pecific _____

M easurable _____

A chievable/Agreed to _____

R ealistic/Result-oriented _____

T ime-framed (goal attainment date) _____

Action Steps to take to achieve this goal:

1. _____

2. _____

3. _____

Helpful People or Tools: (Who/what can help me achieve my goal?)

Additional Training or Knowledge I may need:

How I plan to celebrate my success!

Signed: _____ Date: _____