

A Joint Project of over 400 Rotary Districts worldwide

2018-22

FACULTY—PART I

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

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

2018-2022 RLI Curriculum Committee

RLI Part I – THE ROTARIAN

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

RLI is a recommended program of Rotary International but is not an official program of Rotary International.

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

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

COURSE MATERIALS

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



My Leadership In Rotary

4

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

6

As a Rotarian, I am part of a worldwide organization of like-minded people. Take some time to truly understand the purpose and structure of Rotary. Can these resources help me?



Ethics and Vocational Service

13

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



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

28

I make my club and Rotary stronger by my active participation. Engaged club members have fun, make friends, and effectively serve. This is why I joined Rotary!



Creating Service Projects

34

I am a vital part of a worldwide service organization of business, professional and community leaders meeting needs in communities. I can build, run and promote service.

Course Evaluation

Handout

My Leadership In Rotary

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



Session Goals

Explore the Characteristics of Leadership

Discuss what Motivates People in a Volunteer or Civic Organization

Examine Your Own Leadership Style

Inserts & Online Materials

- The Basics for Effective Leadership Are Really Pretty Basic
http://rlifiles.com/files/resource/Basics_of_Leadership_1.pdf
- 12 Leadership Essentials for the 21st Century
http://rlifiles.com/files/resource/12_Leadership_Essentials.pdf

Key: attached insert ● online article

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

Session Topics

- 1) What is the difference between leadership in a business and leadership in Rotary? What is the role of a “leader” in Rotary? **Consider flip chart for this question and the next.**
- 2) List the characteristics of good leaders. Discuss which characteristics you think are most important.
- 3) Leadership styles may differ by culture and generation. Which leadership style do you feel best represents you?

Go around the room and ask each student which style best fits them. See if any patterns emerge. Conclusion should be that we all take parts of the 5 styles to develop you the leader.

- **Participative:** seeks to involve other people;
- **Situational:** changes leadership style according to situational factors;
- **Transactional:** works through hierarchical structures and systems of reward;
- **Transformational:** leads through inspiration, sharing energy and enthusiasm;
- **Servant:** serves others rather than being served;

- 4) Are good leaders born or can leadership be taught?

YES. RLI believes that while there are certain innate qualities a person brings to leadership, that leadership can be taught in the sense that a person can improve his/her leadership skills. People do differ on this question and all views may have merit.

- 5) What motivates someone to excel in the workplace? What motivates someone to excel in your Rotary club?

Use the characteristics you developed in question 2 to form your style.

- 6) Think about presidents of your club and select who you think was the best leader (without naming names). Tell the group why that leader was the best. What seem to be the most significant differences between strong and weak Rotary club leaders?

Break into groups of 4 or 5 and have them from their own club experiences describe the best club presidents. Have each group select a speaker to promote their best club president.

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 team building we will develop further qualities and characteristics of volunteer leadership.

My Rotary World



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

Session Goals	Materials
Discuss the Purpose of Rotary	◆ MRW-1: My Rotary World Organizational Chart
Understand the Organization Structure	◆ □ MRW-2: RI Strategic Plan
Describe how the structure helps me as a Rotarian	◆ □ MRW-3: The Object of Rotary
	● □ Connect For Good https://www.rotary.org/myrotary/en/document/576
	● □ Rotary Basics https://my.rotary.org/en/document/rotary-basics
	● □ Rotary History by Region by the Rotary Global History Fellowship (RGHF) https://www.rghfhome.org/first100/global/regions/
	● Contact RI Staff https://my.rotary.org/en/contact
Key: ◆ attached insert ● online □ article	

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 our mission—what is Rotary?
- 5) What are the Five Avenues of Service?
- 6) How is Rotary structured?



Put a dot in the center of the flip chart—that represents the Rotarian. Draw circles around the dot to indicate the different levels i.e. club, district, zone, Rotary International

The Rotary District

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

The Rotary Zone

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

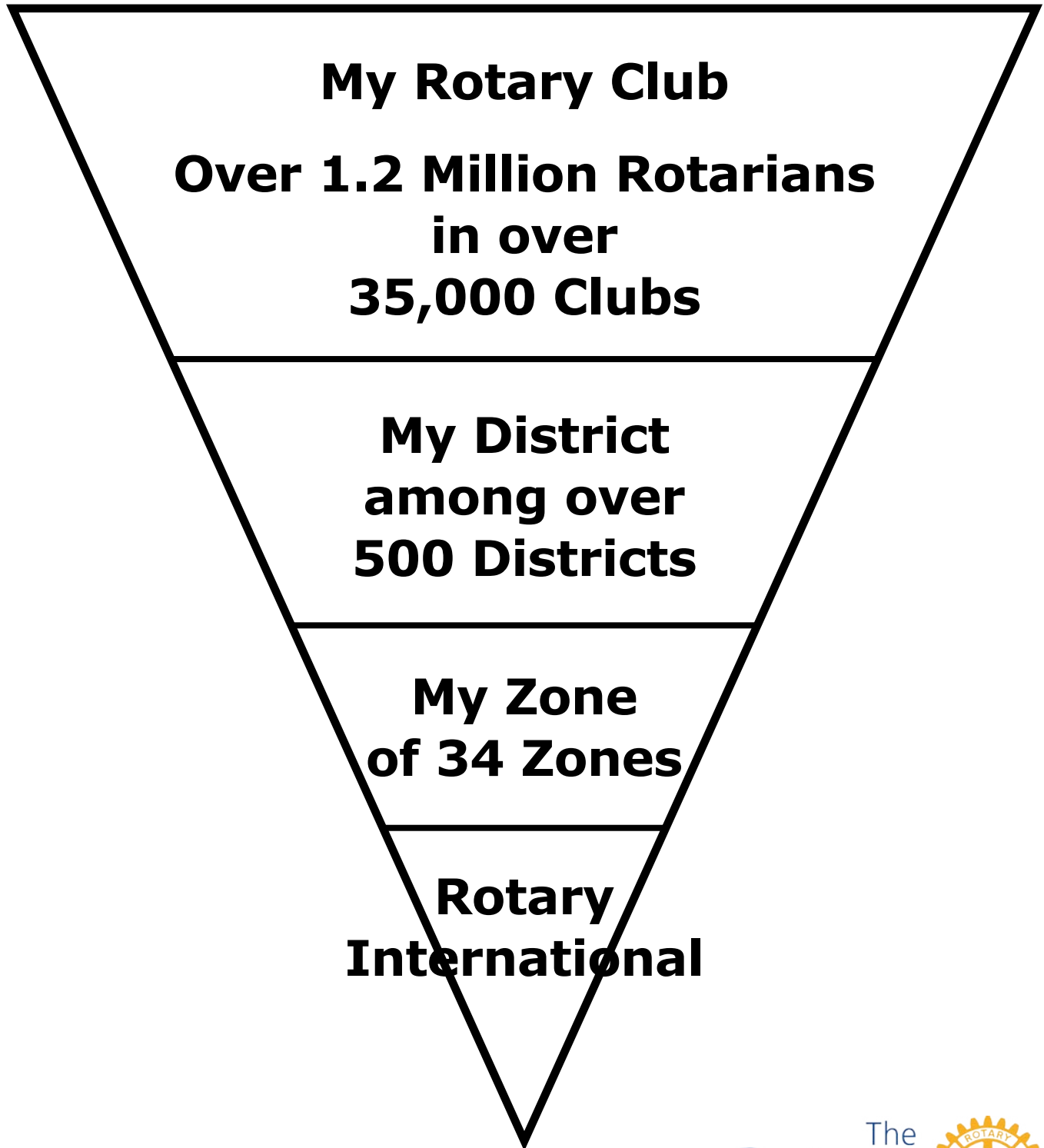
Zones were created by Rotary International to serve as geographical areas for the election of R.I. Directors. The R.I. Board has also used zones for the appointment of R.I. officers noted in paragraph 2.

- 2) What is the role of : the RI Director, Rotary Coordinator, Regional Rotary Foundation Coordinator and Rotary Public Image Coordinator?
- 3) Is the Zone important to the club? Why or why not?

Rotary International (R.I.)

- 1) Why is R.I. necessary? Why can't we just have clubs and not worry about these other entities? Wouldn't it be cheaper if we didn't have to pay dues to R.I. and the district?
- 2) Are there any advantages in being an international organization?
- 3) Does R.I. control/rule the clubs? Is my club autonomous? What is my club required to do? Is there a strategic plan for Rotary? Does Rotary's strategic plan apply to my club?
- 4) How do we contact R.I.? Where can we get information and help?
 - The Rotary International Web Site **www.rotary.org**
 - The Rotary Foundation Contact Center in your geographic area.
 - Zone Web sites
 - RLI - Rotary Leadership Institute Web Sites, including RLI International (Umbrella Organization) at **www.rotaryleadershipinstitute.org** and RLI Division sites listed at that site or provided by your discussion leader.
 - District web sites—links on both Zone web site and R.I. web site, use format **www.rotaryxxxx.org** where the xxxx is the 4 digit District Number

Insert MRW-1: My Rotary World



Insert MRW-2: Rotary International Strategic Plan

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

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

Our International Strategic Priorities & Goals



Insert MRW-2, cont'd.

Rotary International Strategic Plan Priorities and Goals

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

Support and Strengthen Clubs

1. Retain current members
2. Increase current club membership
3. Start new clubs
4. Increase the number of female members, members under 40, and Rotaractors joining Rotary

Focus and Increase Humanitarian Service

1. Eradicate polio
2. Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
3. Increase collaboration with other organizations
4. Create significant projects both locally and internationally
5. Increase cash and DDF contributions to end polio now
6. Increase local and international, district and global grants funded with DDF
7. Encourage Interact and Rotaract clubs to engage in service projects—including projects for the environment—with their local Rotary club and community.
8. Increase contributions to the Annual Fund and build the Endowment Fund to US\$2.025 billion by 2025.

Enhance Public Image and Awareness

1. Unify image and brand awareness
2. Publicize action-oriented service
3. Promote core values
4. Emphasize vocational service
5. Encourage clubs to promote their networking opportunities and signature activities

Insert MRW-2, cont'd.

OUR MISSION

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

OUR CORE VALUES

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

These core values are:

FELLOWSHIP AND GLOBAL UNDERSTANDING

We build lifelong relationships.

ETHICS AND INTEGRITY

We honor our commitments.

DIVERSITY


We connect diverse perspectives.

VOCATIONAL EXPERTISE, SERVICE, AND LEADERSHIP

We apply our leadership and expertise to solve social issues.

Insert MRW-3: The Object of Rotary

R O T A R Y

Rotary 

Object of Rotary

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

- I. *The development of acquaintance as an opportunity for service;*
- II. *High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;*
- III. *The application of the ideal of service in each Rotarian's personal, business, and community life;*
- IV. *The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.*

I N T E R N A T I O N A L

RUSSELL-HAMPTON CO.

Ethics and Vocational Service



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

Session Goals	Inserts & Online Materials
What are Rotary's Guiding Ethical Principles?	◆ <input type="checkbox"/> Insert EVS-1: The Guiding Principles of Rotary
What are the Values we Share?	◆ <input type="checkbox"/> Insert EVS-2: Vocational Service Ideas
How do these Values relate to me and my club?	● <input type="checkbox"/> Article: The Four Way Test Means Business http://rlifiles.com/files/resource/Four_Way_Test_Means_Business.pdf
	● <input type="checkbox"/> Applying the 4 Way Test. http://rlifiles.com/files/resource/Applying_the_Four_Way_Test.pdf
	● Organizing a 4 Way Test Essay. http://www.4waytest.org
Key: ◆ attached insert ● online □ article	

Session Topics

Divide into 4 groups and then discuss Session Topics 1 & 2.

1) How do you define the following "Rotary terms"?

Ethics	Vocational Service
Classifications	Social Responsibility

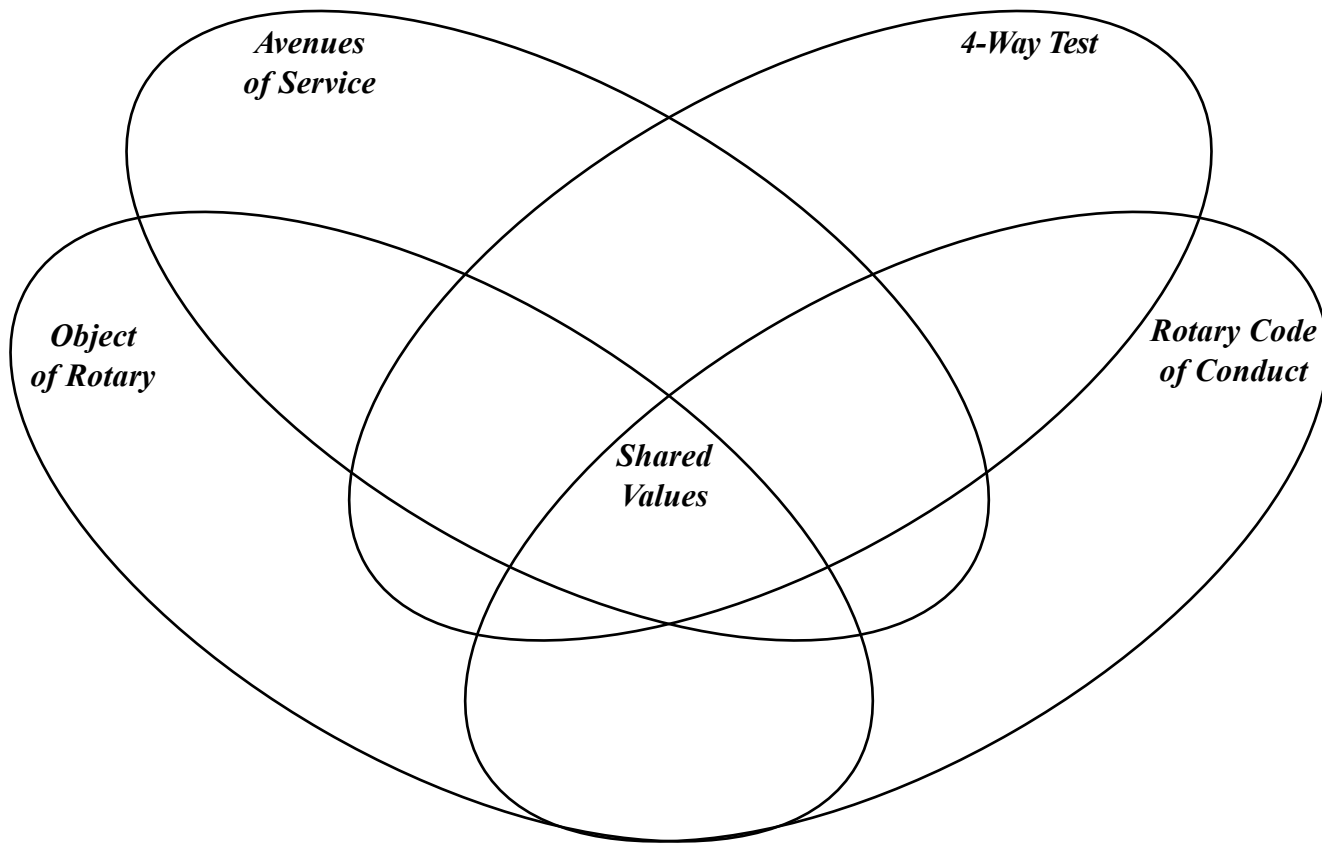
2) Refer to Insert EVS-1: The Guiding Principles of Rotary. For your assigned principle, develop 3 value "key words" best describing the principle. Insert your value "key words" in the box below.

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?
- 5) How do your “Rotary terms” relate to each other?
- 6) Use the diagram below, or a similar diagram, to express any relationships you think may exist. This is a Venn Diagram, where similarities may be expressed in overlapping sections. Be creative.

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

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



- 7) What is the impact of these value relationships?
- 8) How do these values apply to me? My club? My vocation?

Faculty Note: For the “AHA Moment”, faculty can relate the group’s findings with the RI Strategic Plan values of Service, Fellowship, Diversity, Integrity, and Leadership. The RI Strategic Plan materials are located in Exhibit MRW-2 in Part I: My Rotary World.

"Example—good or bad—is contagious...If we set a good example, seeing us, others may do likewise. All of us have more influence than we sometime suppose."

1966-67 RI Pres. Richard L. Evans
— *The Appearance of Things*
THE ROTARIAN, May 1967

Insert EVS-1: Guiding Principles of Rotary

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

Insert EVS-2: Vocational Service Ideas

1. Advancing high ethical standards in the workplace
 - a. In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
 - b. In internal communications, praise and encourage exemplary behavior on and off the job.
 - c. In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.
2. The classification principle
 - a. Classification talks to promote vocational awareness in your club.
 - b. Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
 - c. Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.
 - d. Schedule an occasional meeting in a member's place of employment.
 - e. Invite young people to special vocational meetings.
3. Promote Rotary's commitment to high ethical standards
 - a. Post The Four-Way Test on a prominent billboard in your community.
 - b. Display The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or work space and talk about it.
 - c. "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
 - d. Sponsor a Four Way Test essay contest.
 - e. Sponsor a joint "character literacy" project for young children.
 - f. Conduct a RYLA event with special emphasis on ethics.
 - g. Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.
4. Recognize and promote the value of all useful occupations
 - a. Make classification talks and business tours part of your club's program.
 - b. Join or form a Rotary Fellowship related to your vocation.
 - c. Sponsor a career day for Rotarians to bring young people to their businesses.
 - d. Support professional development
 - e. Encourage members to take leadership roles in business associations.
 - f. Sponsor a seminar for small business entrepreneurs.
 - g. Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
 - h. Start a career counseling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.
5. Volunteer your vocation
 - a. Mentor a young person.
 - b. Use Rotary's ProjectLINK database to identify a project in need of your specialized vocational skills.

Foundation I: Our Foundation



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

Session Goals	Materials
<p>Understand the Basic Goals, Programs & Financing of our Rotary Foundation</p> <p>Discuss the Importance & Value of our Rotary Foundation to your Club</p> <p>Need for each Rotarian to make TRF their charity of choice</p>	<ul style="list-style-type: none"> ◆ □ OF-1: Rotary News 1A, 1B, 1C, 1D ◆ □ OF-2: Rotary Foundation Grants and Related Programs, from Rotary Foundation Reference Guide, 219-EN (1012), pages 8-12 ◆ □ OF-3: Foundation Facts—Giving <i>159-EN (1113)</i>, Graphics http://www.rotary.org/en/document/12436 ◆ OF-4: Charity Navigator Rating ◆ OF-5: Direct Contribution Commitment Form https://my.rotary.org/en/document/contribution-form-rotary-foundation ● Donor Recognition Page https://www.rotary.org/en/donate/recognition ● □ Rotary Foundation Reference Guide <i>219-EN (1012)</i> http://www.rotary.org/en/document/518 ● □ Connect for Good (formerly Rotary Basics) https://www.rotary.org/myrotary/en/document/connect-good ● Doing Good in the World http://vimeo.com/album/1872866
<p>Key: ◆ attached insert ● online □ article</p>	

How do clubs benefit from it and thereby lead into how does it then benefit the “world”, etc.

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

Session Topics

- 1) How many of you have held roles in your club or in the District involving The Rotary Foundation? What role(s) have you had?

- 2) What is The Rotary Foundation and what does it do? How does it help you do good in the world?

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

Engage the attendees in one of the following exercises:

Exercise #1: Distribute sticky note pads to attendees and ask all participants to write on the sticky notes one or two service projects in which their clubs have participated. Draw a large cooking pot on the easel pad with "flames" drawn underneath and ask each participant to place the sticky notes on the pot, announcing to the class what the project is. After all participants have added sticky notes, pull sticky notes off at random, ask the question in #4 below about the various projects, and discuss funding, etc.

Alternate Exercise #2: Divide participants into groups of four and assign one of the Rotary Stories at Inserts OF-1-A to OF-1-D to each group. Allow 10 minutes for them to answer the three questions at the bottom of each story: Why engage this project? Why now? and Why Rotary? Ask participants to report out with responses and discuss. Then allow the groups an additional 2–3 minutes to condense their responses into one sentence and report to the entire group. Suggest the facilitator write their responses on the easel pad—this allows the facilitator to choose the most instructive words.

Discuss the responses.

- 4) What was the role of the Rotary Foundation in these projects?

Funding provided through Global Grants, District Grants, perhaps no TRF funding at all. If not, ask why not? Note that Global and District Grants will be discussed in more depth in Part II.

- 5) How do Rotary's Areas of Focus influence the financing of these many different projects? Must all projects meet the requirements of the Areas of Focus?

The Areas of Focus describe the programs and projects for which Global Grants can be used. All Global Grant projects must be determined to be sustainable for the indefinite future and must be supported with the community needs assessment demonstrating that the project is necessary. Global Grants must be at least \$30,000. District Grants cost less than \$30,000 and not required to demonstrate sustainability or fall within the Areas of Focus

- 6) How can you and your club contribute to and raise funds for our Rotary Foundation?

Donations can be made by individuals (check or direct withdrawal), clubs, districts, corporations, other foundations, non-governmental organizations, governments, or fundraising from the general public. Note that Rotary Direct is a highly convenient way to contribute regularly/periodically to the Foundation. Refer to the Rotary Direct contribution form insert.

- 7) When you give money to our Rotary Foundation, can you designate where the funds go and for what purpose?
Yes.

What are the options and how do they work?

Funds can be given to The Annual Fund (analogize to a checking account, spent annually), The Endowment Fund (analogize to a savings account, held as a traditional endowment where the interest-only is spent and the principal remains), or designated to funds supporting specific initiatives, such as Polio Eradication, Peace Scholars, or specific grants. See also OF-3: Foundation Facts – Giving.

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

TVNNBSJF:

- A. More details on the programs of our Foundation can be read about in Insert OF-2 and at Rotary.org.**
- B. You can learn more about the Rotary Grant Model by attending RLI Part II in the session “Targeted Service” and learn more about district-related information at one of your district’s Grants Seminars.**

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

TRF Giving & Recognition	Annual Fund	Endowment Fund
“Every Rotarian, Every Year” or “EREY” recognizes clubs 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 the Endowment Fund
“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	“Major Donor” recognizes a cumulative \$10,000 USD gift to TRF
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	“Arch Klumph Society” recognizes a cumulative \$250,000 USD gift to TRF

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

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

Suggestion to group leaders: You may use stories other than the stories in the inserts for the Alternate Exercise. Additional stories can be found in Rotary Showcase on the Rotary Website. Inform attendees that Rotary Showcase is a good resource for additional stories of this type.

Insert OF-1A: Rotary News:

Rotary and Partners “this close” to Eradicating Polio Worldwide

Kabul, Afghanistan – January 1, 2014

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



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

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

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

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

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

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

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

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

Insert OF-1B: Rotary News:

Rotary Peace Fellow Helps Build New Countries and Old

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

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

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

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

1. Why Engage this Project?



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

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

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

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

2. Why Now?

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

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

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

3. Why Rotary?

Insert OF-1C: Rotary News:

Rotary Targets First 24 Hours of Life in East Africa

*Kampala, Uganda –
November 1, 2013.*

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

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



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

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

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

Photo: Doctor in Uganda. Credit: Rotary

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

Insert OF-1D: Rotary News:

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

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

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

A local non-profit organization,

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

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

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



serving 40 students who had no other opportunity to learn.

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

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

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

Photo Credit: CSARO/GFC

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

Insert OF-2: Areas of Focus

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

1. Peace and conflict prevention/resolution

2. Disease prevention and treatment

3. Water and sanitation



4. Maternal and child health



5. Basic education and literacy

6. Economic and community development



Insert OF-3: Foundation Facts - Giving

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

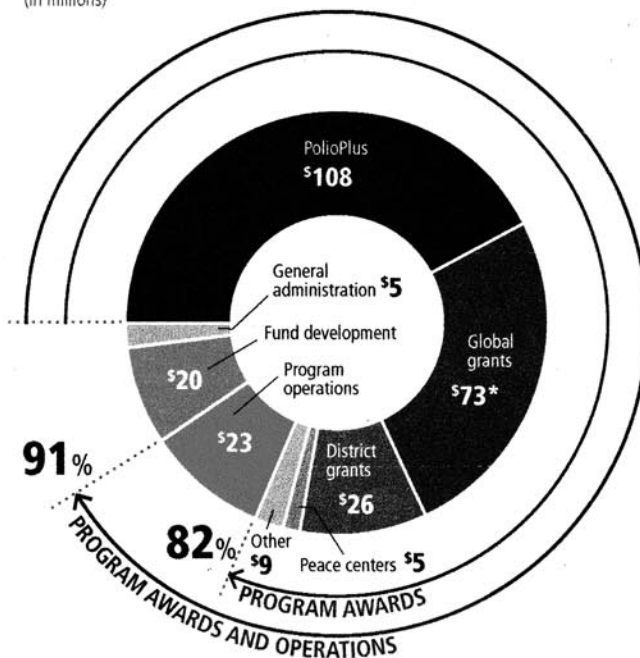
How does Rotary spend membership dues?

Annual dues 2016-17 **\$56.00**

	\$19.55	Programs and member services
	\$11.79	IT, operations, and administration
	\$9.34	Communications
	\$5.17	International operations
	\$4.11	Governance and executive
	\$3.67	Finance
	\$2.37	HR, legal, and audit

Foundation expenditures

(in millions)



Rotary International Statements of Activities

For the fiscal years ended 30 June 2016 and 2017 (thousands of U.S. dollars)

REVENUES	YEAR TO DATE	
	2016 Actual	2017 Actual
Dues	\$ 67,459	\$ 68,784
Net investment return	(2,956)	9,527
Services and other activities	33,571	28,529
TOTAL REVENUES	\$ 98,074	\$ 106,840
EXPENSES		
Operating	\$ 69,416	\$ 74,117
Services and other activities	27,560	20,819
General Surplus Fund	6,159	1,577
TOTAL EXPENSES	\$ 103,135	\$ 96,513
Currency exchange losses	\$ (1,188)	\$ (75)
Pension-related changes	\$ 4,320	
Change in net assets	\$ (1,929)	\$ 10,252
Net assets – beginning of year	\$ 128,516	\$ 126,587
Net assets – end of year	\$ 126,587	\$ 136,839

The Rotary Foundation Statements of Activities

For the fiscal years ended 30 June 2016 and 2017 (thousands of U.S. dollars)

REVENUES	YEAR TO DATE	
	2016 Actual	2017 Actual
Contributions	\$ 265,616	\$ 304,375
Net investment return	(6,653)	98,052
Grants and other activities – net	(787)	(2,529)
TOTAL REVENUES	\$ 258,176	\$ 399,898
EXPENSES		
Program awards	\$ 221,147	\$ 221,204
Program operations	25,223	23,206
Fund development	18,427	19,888
General administration	5,247	4,753
TOTAL EXPENSES	\$ 270,044	\$ 269,051
Currency exchange losses	\$ (6,419)	\$ (495)
Pension-related changes	\$ 3,394	
Reserve against pledges receivable	\$ (994)	\$ (1,810)
Change in net assets	\$ (15,887)	\$ 128,542
Net assets – beginning of year	\$ 946,021	\$ 930,134
Net assets – end of year	\$ 930,134	\$ 1,058,676

Insert OF-4: Charity Navigator Rating

Foundation receives highest rating from Charity Navigator

For the 10th 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.

Insert OF-5: Direct Contribution Commitment Form

ROTARY DIRECT

Rotary's recurring giving program



ROTARY DIRECT SAVES...

- ✓ **Time** — Sign up once to give continuous support
- ✓ **Money** — Lower administration costs means more money for programs
- ✓ **Lives** — Give to The Rotary Foundation to do good in the world

DOING GOOD JUST GOT EASIER!

Enroll online: www.rotary.org/give

OR Mail: Rotary Direct FD420
 Rotary International
 One Rotary Center
 1560 Sherman Avenue
 Evanston, IL 60201-3698 USA

OR Fax: +1-847-328-5260

Please call to modify your existing Rotary Direct contributions
Phone: +1-866-976-8279

YES! I INTEND TO GIVE \$1,000 OR MORE ANNUALLY AND WILL JOIN THE PAUL HARRIS SOCIETY.*

YES! I WILL ENROLL IN ROTARY DIRECT.

Name _____

IF YOU ARE A ROTARIAN, PLEASE COMPLETE.

Rotary membership ID _____

Club name _____

Club number _____

Billing address _____

City _____ State/Province _____

Postal code _____ Country _____

Phone _____

Email _____

Contributions are tax deductible where allowed by law. For security purposes, please do not send credit card contributions via email.

**Note: The Paul Harris Society recognizes those who give \$1,000 or more each year to the Annual Fund, PolioPlus Fund, or an approved Foundation grant. Learn more at www.rotary.org/paulharrissociety.*

GIFT DESIGNATION (choose one)

- | | |
|--|--|
| <input type="checkbox"/> Annual Fund-SHARE | <input type="checkbox"/> PolioPlus Fund |
| <input type="checkbox"/> Providing Clean Water | <input type="checkbox"/> Fighting Disease |
| <input type="checkbox"/> Supporting Education | <input type="checkbox"/> Saving Mothers and Children |
| <input type="checkbox"/> Promoting Peace | <input type="checkbox"/> Growing Local Economies |
| <input type="checkbox"/> Other _____ | |

RECURRING GIFT AMOUNT (minimum US\$10)

\$25 \$85 \$100 \$250 \$1,000 Other _____

Currency (if not US\$) _____

FREQUENCY

Monthly Quarterly Annually (specify month) _____

CHECKING ACCOUNT, please attach a voided check

Available for U.S. and Canada bank accounts only – not available online

CREDIT OR DEBIT CARD

Visa MasterCard AmEx Discover

Card number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Expiration

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 /

--	--	--	--

CVN

--	--	--	--

Signature _____



Engaging Members



I make my club and Rotary stronger by my active participation

Session Goals

Explore the value and options of engaging our members.

Materials

- ◆ EM-1: Sample Membership Satisfaction Survey (RI)
 ● Expanded Membership Satisfaction Survey:
<http://my.rotary.org/en/document/enhancing-club-experience-member-satisfaction-survey>
- ◆ EM-2: Engagement Ideas: Delivering Value - Keeping Rotarians
- ◆ EM-3: 12 Point Plan for Membership Engagement
- Creating Your Membership Development Plan
<https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>
- Club Assessment Tools
<https://my.rotary.org/en/document/community-assessment-tools>
- No Success Without Succession, Michael McQueen 2010
<http://www.clubrunner.ca/Data/7080/132/HTML/105658//NoSuccess.pdf>
- Membership Page at www.rotary.org
www.rotary.org/myrotary/en/learning-reference/learn-topic/membership

Key: ◆ attached insert ● online article

Session Topics

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

Insert EM-1: Membership Satisfaction Survey

(3 pages)

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

Do you feel welcome in our Rotary club? Yes No

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

Compared to me, other members are (check all that apply):

Older Younger Different gender Different ethnicity Other _____

Club members haven't made an effort to interact with me.

Other _____

Do you feel comfortable sharing concerns with club leaders? Yes No

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

Club leaders have so many responsibilities; I don't want to burden them.

Club leaders have their own agenda and aren't interested in other ideas.

I haven't been a member long enough to feel comfortable approaching club leaders.

I don't want to be perceived as a complainer.

Other _____

How would you rate the level of our club's involvement in the following types of activities?

	Excellent	Adequate	Insufficient	Not Aware
Membership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you participated in club projects and activities? Yes No

If yes, how did you become involved? I volunteered I was asked

If no, why not? _____

Please indicate your involvement in the following types of activities:

	Currently Involved	Would Like to Be Involved
Membership development	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>

How would you rate your level of satisfaction with your participation in club activities and projects?

- Very satisfied Satisfied Dissatisfied

If dissatisfied, why? (check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Insufficient knowledge | <input type="checkbox"/> Lack of quality service projects |
| <input type="checkbox"/> Personality conflicts | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other _____ |

How would you rate the following costs associated with membership in our club?

	Excessive	Reasonable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>
Weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>
Club fines/assessments	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to service projects	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>

	Excellent	Adequate	Insufficient
Amount of Rotary content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Convenient	Inconvenient	
Location	<input type="checkbox"/>	<input type="checkbox"/>	Suggested location: _____
Meeting time	<input type="checkbox"/>	<input type="checkbox"/>	Suggested time: _____

Which aspects of our meeting place do you find unsatisfactory? *(check all that apply)*

- Service
- Décor/atmosphere
- Meal quality
- Meal cost
- Parking availability
- Other _____

Which of the following changes would improve our club meetings? *(check all that apply)*

- Better speakers
- Increased variety of program topics
- More involvement of family
- More service opportunities
- More focus on fellowship
- Increased emphasis on vocational information
- Better time management
- More leadership opportunities

How would you rate the amount of our club's fellowship activities?

- Too many
- Right amount
- Too few

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

- Excessive
- Adequate
- Insufficient

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

(check all that apply)

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

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











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

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

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

The Issue. While overall membership has remained stagnant, Rotary Clubs have gained and lost approximately 1.2 million members worldwide in the past 7 years- a staggering retention failure. Rotarians who leave for involuntary purposes (death, relocation, etc.) make up only 7% of the retention loss annually. Statistics from select regions in the Eastern US, Caribbean and South America show that the members who voluntarily leave are usually those who have been in Rotary less than 3 years ("Newer Members"). Newer Members indicate they stay in Rotary to: (1) serve their community, (2) network, and (3) represent their vocation and develop leadership skills.

The Fix. 10 easy-to-do ideas for your club targeted to address these issues and to meet the expectations of Newer Members.

 <p>Pair Bonding. Place newer members on a Newer Member Classification Committee tasked to review all club classifications and to pair newer members with more experienced members. Pairings are to be announced in club meeting. Pairs will sit together during designated meetings, at least monthly. Monthly discussion topics will be encouraged from the podium, such as club history, past club projects, vocational sharing, favorite make-up meetings, and ideas for new community service projects.</p>	 <p>A Minute in the Life. Newer members are scheduled for one-per-week, one minute club meeting podium summary of a job or career related service or product they offer, idea or opportunity in a one page, written format. Talks are not to go "off-script", no "ad libbing". Collect and post summary in weekly club program or on club website, with a link or reference to their business.</p>
 <p>Web-Connected. The name of every Rotarian in the club should be posted to the club website, with their business name linked to their individual or company website (voluntary and with permission). Rotarians should mention their Rotary affiliation on their individual or company website and link back to their club website.</p>	 <p>RLI Posse. Newer members should be financed by the club and sent in small groups to a convenient Rotary Leadership Institute near them, commuting together. The group should report back, as a group, at a club meeting, and should make and advocate for 3 proposals for innovation and /or new projects to the club and /or board. See www.rotaryleadershipinstitute.org.</p>
 <p>Party Time. Organize clubs to meet once a month at a non-Rotary place and time for a "meet and greet" social and networking session. Clubs may sponsor the costs or it may be arranged "pay as you go" for Rotarians, with a very low cost. Mingling may be encouraged by use of varied passports, stations, "secret Rotarian" or other mixing strategies, if needed.</p>	 <p>Adopt-a-Class. Newer members partner with a local elementary or middle school teacher and class to perform a "hands-on", low or no cost service project at or near their school. First step is a needs assessment with school administration or personnel. The whole club can be invited, but the newer members lead.</p>
 <p>"Flash Mob" Project. Charge newer member committee with organizing and conducting a single or multi-club "hands-on" community service project, maximum duration 2 hours. Document with video or photos. Present report at regular club meeting.</p>	 <p>Career-Share. Charge newer member committee with organizing and conducting a single or multi-club "Career Fair", "Career Day", or "job shadowing" event for local Middle School, High School, or College.</p>
 <p>How Do You Interact? Start an Interact club at a school with the younger age now allowed (12 and up), in Middle School. Newer members lead the effort, work with the school sponsor, attend meetings, and serve as Rotarian sponsor for the club.</p>	 <p>Fun Committee. It's exactly what it sounds like! Staff with (mostly) newer members.</p>

Insert by PDG Bevin Wall, Zone 33 Rotary Coordinator 2010-2013. rcBevin@gmail.com

Insert EM-3: Twelve Point Plan for Member Engagement

- 1) Set up a Member Services Committee
- 2) Measure & Examine Club's History of Engagement and Member Retention Rate
- 3) Provide Pre-Induction Orientation Program
- 4) Greet – Assign a Job – Introduce –
- 5) Develop a Mentor & Education Program
- 6) Conduct a Reception for New Members
- 7) Log New Member Activities the first year
- 8) After Year One- Recognize & Interview
- 9) Advocate New Member Opportunities
- 10) Provide Networking & Professional Development Opportunities
- 11) Spot Danger Signs and Remedy Engagement Problems
- 12) Be Innovative – Highlight the Reasons We Stay in Rotary

Creating Service Projects



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

<p>Session Goals</p> <p>Learn to identify, plan, organize and implement a service project in your club</p> <p>Develop a business plan for your service project</p> <p>Learn how to evaluate the success of your project</p>	<p>Materials</p> <ul style="list-style-type: none"> ◆ Insert SP-1: Service Project Questions ◆ Insert SP-2: Alternative Service Projects ● □ Communities in Action: A Guide to Effective Projects. <i>605A-EN (112)</i> rlifiles.com/files/resource/Communities_in_Action_605a_en.pdf ● □ Community Assessment Tools. <i>605C-EN (1006)</i> http://rlifiles.com/files/resource/Comm_Assess_Tools.pdf ● □ The Rotary Foundation’s Six Areas of Focus 965-EN www.rotary.org/myrotary/en/document/rotary%E2%80%99s-areas-focus ● □ Lead Your Club Service Projects Committee #2260 https://my.rotary.org/en/document/lead-your-club-service-projects-committee <p>Key: ◆ attached insert ● online □ article</p>
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Session Topics

- 1) You have been appointed to chair a committee to develop a new service project for your Rotary Club.
 - a) How do you start?
 - b) Outline the steps you should take.
 - *Determine the need*
 - *How do you approach the club: make a plan or with just an idea?*
 - *Establish buy-in*
 - *Gain support of club members and the community*
 - *Time, costs, level of involvement, and size of project are important*
 - *How does the project fit in with other club activities?*

"The time we take to serve those who need us can be the turning point, not only in their lives but also in our own."

*1980-81 RI Pres. Rolf Klarich
— Take Time to Serve
THE ROTARIAN, July 1980*

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

- c) How much risk do we or should we take with service and fund raising projects?
 - d) Share fundraising ideas from Rotary Clubs that can help raise funds for “hands – on” projects.
- 6) We have discussed ways to do service projects so let’s do one. Turn to SP2 Alternative Service Project. Divide into 3 groups and solve the problem.

SUMMARY

Good Rotary Service projects require:

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

Coming Attractions: Previewing RLI Part II

**Part I centered on the basics of being a Rotarian.
Part II builds on the Part I courses,
and seeks to increase your effectiveness in your Rotary club!**

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

Insert SP-1: Service Project Questions

1. Can a Rotary club do anything to help?
2. If so, what can Rotarians do “hands on” to help?
3. How much funding is required? Fundraising?
4. How can the project be designed? What is needed?
5. Will the project generate good publicity for the club?
6. Can the members be “sold” on the project?
7. Is this a one-year project or a continuing project?
8. What other community resources are available or what other organizations should be involved?
9. What are the steps necessary to move forward?

Insert SP-2: Alternative Service Projects

Service Project A

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

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

Service Project B

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

Service Project C

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