A Joint Project of over 400 Rotary Districts worldwide

2018-22

FACULTY—PART II

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

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

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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.

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**.

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As I further my Rotary journey, I can explore the many opportunities available within Rotary for personal, community and professional growth and development.

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I can lead and promote my club's participation in unique, significant and targeted service opportunities through our Foundation. Understand the key concepts of Rotary programs!

Coming Attractions Last Page

Course Evaluation Handout

Rotary Opportunities

As I further my Rotary journey, I can explore the many opportunities available within Rotary for personal, community and professional growth and development

Session Goals

Provide an overview of RI's structured programs

Discuss the benefits of a Global Networking Group to me?

Discuss each program's relation to Rotary's goals and to a Rotarian's Rotary experience

Materials

- ◆ ☐ Insert RO-1: The Programs of Rotary International
- ◆ Insert RO-2: Be A Vibrant Club
- ◆ Insert RO-3: List of Rotary Fellowships
- ◆ Insert RO-4: List of Rotarian Action Groups
- ◆ ☐ Insert RO-5: Rotarian Action Groups flyer
- ● Global Networking Directory (sign-in required)
  https://www.rotary.org/myrotary/en/exchange-ideas

Key: ◆ attached insert ● online ☐ article

Session Topics

1) What are Rotary International's structured programs? See the list on page 5 and discuss.

See Insert RO-1 for list. If Participants struggle with naming the RI Structured Programs, this is an opportunity for faculty. Faculty can describe aspects of the programs not identified, through their own experience or research or through the description on Insert RO-1 and see if Participants memories can be refreshed. For example, there is a program of RI that is primarily set on college campuses today, although they can be based in communities for young people ages 18-30? ROTARACT. The name is less important than the fact that Rotary has this program that reaches this particular group, or serves this particular need. The participants' difficulty in naming the programs also allows faculty to ask: Why don't we know about these programs? At what point is the information about these programs being restricted? If we know about RYLA, why don't we know about Friendship Exchange? And, faculty can use these responses to move into the 1a, 1b, 1c questions…

a) How can Rotary Clubs use these structured programs?
To supplement or enhance opportunities for Rotarian to engage in Rotary service and/or fellowship.
What does your Club do to participate in these programs?

b) What does your District do to encourage participation or to organize district-wide or multi-club activity in these programs?
Programs at district events, newsletter items, discussed in Governor's Club visit.

Interact
Rotary Sponsored Club

c) What is your involvement or your club's involvement with any of the listed programs?

d) How could you or your club begin participating in one of these programs?

Start with Club program, then look for ways to combine or expand a current club activity or project. A club champion for a particular interest, vocation or service activity is a must.

Rotaract
Rotary Club Partner

e) For several of the programs, discuss how they fit Rotary's mission.
Suggestion: Use the 5 Avenues of Service for this analysis.
Alternative: Use the Object of Rotary, see Part I, Insert RBC-5, to analyze.

Rotary
Community Corps

Fellowships

1) What are Rotary Fellowships?
Groups of Rotarians who get together to pursue common recreational, vocational or service-oriented interests?

   a) How does Rotary recognize and support them?

   b) How might these groups work?

   c) What is their scope and how does that effect their activity?

Rotary Friendship Exchange

2) Do Rotary Fellowships take away from Club Service?

3) Could participation in a Rotary Fellowship enhance membership retention?

Rotary
Youth Exchange

Rotarian Action Groups

1) What are Rotarian Action Groups?

2) Could participation in a Rotarian Action Group support local or international service projects?

Rotary | RYLA

3) Discuss what may be typical projects.

4) What do Rotarians get out of participating in these activities and do they advance the mission of Rotary?

Miscellaneous

1) How would you join one of these groups?

2) Propose five new fellowships or action groups.

3) How could these groups enhance Rotary?
See: RO-3, RO-4

Insert RO-1: The Programs of Rotary International

Rotary International's programs and service opportunities, listed below, are designed to help Rotarians meet the needs of their own communities and assist people worldwide.

Global Networking Groups encompass Rotary Fellowships (vocational and recreational interest groups) and Rotarian Action Groups (groups focused on service activities). The more than 90 Global Networking Groups are open to all Rotarians, spouses of Rotarians, and Rotaractors.

Interact is a service organization organized and sponsored by Rotary clubs for youth ages 14-18. It has more than 10,900 clubs in 121 countries.

Rotaract is organized by Rotary clubs to promote leadership, professional development, and service among young adults ages 18-30. There are more than 7,000 clubs in 162 countries.

Rotary Community Corps (RCC) are groups of non-Rotarians who work to improve their communities. There are more than 6,400 RCCs in 76 countries, all organized and sponsored by Rotary clubs.

Rotary Friendship Exchange encourages Rotarians and their families to make reciprocal visits to other countries, staying in each other's homes and learning about different cultures firsthand.

Rotary Volunteers (Phased out June 30, 2011)

Rotary Youth Exchange offers students ages 15-19 the chance to travel abroad for cultural exchanges of one week to a full academic year. Rotary clubs and districts sponsor and host about 9,000 Youth Exchange students a year.

Rotary Youth Leadership Awards (RYLA) are seminars sponsored by clubs and districts to encourage and recognize the leadership abilities of youth and young adults ages 14-30.

World Community Service (WCS) (Phased out June 30, 2011)

Insert RO-2: Be A Vibrant Club

HOW WE DID IT

We rewrote our values statement.

The updated language — which calls us "a service club of inspired individuals whose contributions improve lives in communities locally and worldwide" — unified our members, inspired prospective members, and generated interest in our community work.

We introduced creative meeting formats.

Our club provides innovative and flexible, cost-free meeting options:

Speed networking. This helps our members build relationships and rapport.

Service first Thursdays. On the first Thursday of each month, we meet at the public library to clean books and prepare and inventory multimedia materials.

1905 meetings. Our 1905 meetings honor the early days of Rotary tradition. Like the first Rotarians, we meet in small groups. Members can participate remotely by meeting at designated locations closer to their workplaces. We use Facebook Live to tune in simultaneously to our club president for the first half of the meeting. For the second half, we break into small groups to discuss a video presentation on the theme of the month.

The varied formats increased member engagement in a way that wasn't possible with traditional meetings alone. Even former Rotarians started to re-engage. While our weekly attendance may be around 60 members per meeting, our real-time Facebook Live videos that broadcast our 1905 meetings and traditional meetings have generated over a thousand views.

Our experience has taught us that it is possible to make changes in the spirit of innovation and flexibility yet maintain Rotary values. We discovered that there are many fun ways to serve and promote fellowship with Rotarians.

We relaxed attendance guidelines.

While we are committed to making our meetings more accessible to working members, we also wanted to continue regular meetings, because they foster the fellowship and camaraderie that our members enjoy. We revised guidelines to require only 50 percent attendance at the weekly meetings. Missed meetings can be made up at other Rotary meetings or by participating in a service activity.

START YOUR CLUB ON A PATH TO VIBRANCY

Vibrant clubs engage their members, conduct meaningful projects, and try new ideas. List the new ideas your club wants to try, and create a plan to increase community interest and attract more members.

As you develop your plan, use these tips and ideas, and let your club evolve.

Decide what you'd like your club to be like in three to five years.

- Plan an annual visioning session, and use the **Rotary Club Health Check** to identify your club's strengths and areas that need improvement.
- Use the **Strategic Planning Guide** to set long-term goals.

Decide on your annual goals, and enter them into **Rotary Club Central.**

- Focus on something your club is good at, and make it something your club is great at.
- Update committees once a month on your goal progress.

Hold club meetings that keep members engaged and informed.

- Conduct the **Member Satisfaction Survey** to find out what your members like and don't like about your club, and create a plan for implementing changes.
- **Vary your meeting format** to include a mix of traditional and online meetings, service projects, and social gatherings.

Communicate openly in your club.

- Share information at club meetings, on your club website, and through social media, and check regularly to see how members are feeling.
- Use the templates and resources in the Rotary **Brand Center** to create your club brochures and newsletters.

Prepare members for future roles to smooth leadership transitions.

- Ensure continuity by making appointments for multiple years, having a current, incoming, and past chair on each committee.
- Conduct on-the-job training for incoming club officers, and have job descriptions for each officer.

Adapt your club's bylaws to reflect the way the club works.

- Involve your members when you review your club's bylaws every year.
- Edit the **Recommended Rotary Club Bylaws** template to reflect new practices and procedures.

Develop strong relationships within your club.

- Find suggestions in **Introducing New Members to Rotary**.
- Sit with different people at each meeting.

Make sure all members are involved in activities that genuinely interest them.

- Conduct a member-interest survey, and use the results to plan projects, activities, and engaging meetings.
- Get new members involved early by learning their interests and giving them a role in the club.

Coach new and continuing members in leading.

- Appoint a club training committee to oversee training for members.
- Use the **Leadership in Action guide on starting a program** to develop members' leadership skills.

Create practical committees for your club.

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.

Insert RO-3: List of Rotary Fellowships

(For current fellowships, see https://www.rotary.org/myrotary/en/rotary-fellowships.)

Amateur Radio
Antique Automobiles
Authors and Writers
Beer
Bird Watching
Bowling
Canoeing
Caravanning
Carnival and Festivals
Chess
Computer Users
Cooking
Convention Goers
Cricket
Cruising
Curling
Cycling
Doctors
Doll Lovers
E-Clubs
Editors and Publishers
Environment
Esperanto
Fishing
Flying
Geocaching
Go
Golf
Home Exchange
Honorary Consuls
Horseback Riding
Internet
Italian Culture
Jazz
Latin Culture
Lawyers
Magicians
Magna Graecia
Marathon Running
Motorcycling
Music
Old and Rare Books
Past District Governors
Photographers
Police and Law Enforcement
Pre-Columbian Civilizations
Quilters and Fiber Artists
Railroads
Recreational Vehicles
Rotary Global History
Rotary Heritage and History
Rotary Means Business
Rotary on Stamps
Scouting
Scuba Diving
Singles
Skiing
Social Networks
Tennis
Total Quality Management
Travel and Hosting
Wellness and Fitness
Wine
Yachting

Insert RO-4: List of Rotarian Action Groups

(For current action groups,
see https://www.rotary.org/myrotary/en/document/rotarian-action-groups-officer-directory.)

Alzheimer's/Dementia	*http://adrag.org*
Blindness Prevention	*http://www.rag4bp.org*
Blood Donation	*http://www.ourblooddrive.org*
Child Slavery	http://*www.roisight.org/cs/*
Dental Volunteers	http://*www.ragdv.com*
Diabetes	http://*www.ragdiabetes.org*
Disaster Assistance	barry@rassin.org
Endangered Species	http://*www.endangeredrag.org*
Family Health & AIDS Prevention	http://*www.rffa.org*
Food Plant Solutions	http://*www.foodplantsolutions.org*
Health Education and Wellness	*http://www.hewrag.org/*
Hearing	http://*www.ifrahl.org*
Hunger and Malnutrition	http://*www.alleviatehunger.org*
Literacy	http://*www.litrag.org*
Malaria	http://*www.remarag.org*
Microfinance and Community Development	*http://ragm.org*
Multiple Sclerosis	http://*www.rotary-rfmsa.org*
Peace	http://*www.rotarianactiongroupforpeace.org*
Polio Survivors and Associates	http://*www.rotarypoliosurvivors.com*
Population Growth and Sustainable Development	http://*www.rifpd.org*
Preconception Care	knijff44@gmail.com
Water and Sanitation	http://*www.wasrag.org*

Faculty: Consider printing current lists of fellowships and action groups as handouts for the class.

Insert RO-5: Rotarian Action Groups (Flyer)

ROTARIAN ACTION GROUPS

Rotarian Action Groups help Rotary clubs and districts plan and carry out community development and humanitarian service projects in their area of expertise. The groups are organized by Rotarians and Rotaractors who are proficient, and have a passion for service, in a particular field.

HOW ROTARIAN ACTION GROUPS OPERATE

- Each group functions independently of Rotary International establishing its own rules, dues requirements, and administrative structure.
- Membership is open to Rotarians, their family members as well as participants and alumni of all Rotary and Foundation programs.
- Rotarian Action Groups must adopt Rotary International's standard bylaws and operate in accordance with Rotary policy.
- Rotarian Action Groups regularly collaborate with clubs and districts on service projects in their area of specialty.
- Rotarian Action Groups can help clubs and districts obtain funding or other assistance for their service projects.

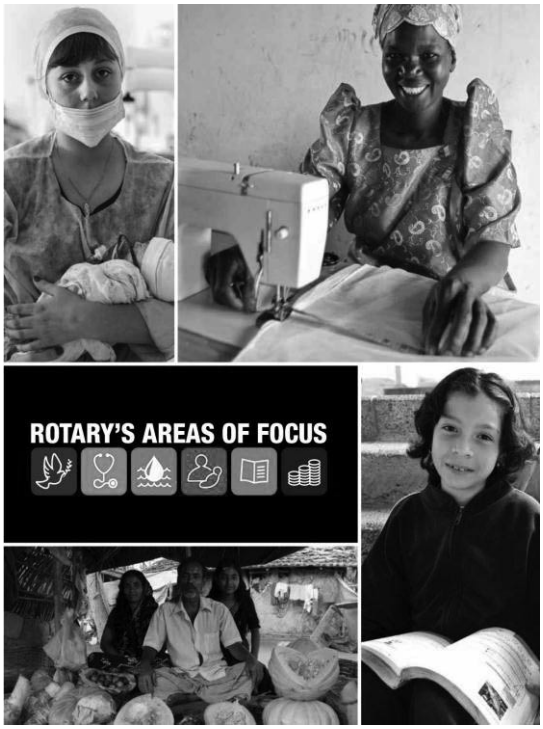
BENEFITS OF ROTARIAN ACTION GROUPS

- By joining a Rotarian Action Group, you can engage in meaningful service activities outside your own club, district, or country.
- By partnering with a Rotarian Action Group, your club or district gains the support of experts for planning and implementing a project.

TAKE ACTION: www.rotary.org/actiongroups

ROTARIAN ACTION GROUPS

Do you have expertise and a passion to serve in a particular area?
Visit the website of the relevant Rotarian Action Group to learn more.



AIDS and Family Health	www.rfha.org
Alzheimer's and Dementia	http://adrag.org/
Blindness Prevention	www.rag4bp.org
Blood Donation	www.ourblooddrive.org
Child Slavery	www.racsrag.org
Dentistry	www.ragdv.com
Diabetes	www.ragdiabetes.org
Disaster Assistance	barry@rassin.org
Endangered Species	www.endangeredrag.org
Food Plant Solutions	www.foodplantsolutions.org
Health Education and Wellness	www.hewrag.org
Hearing	www.ifrahl.org
Hunger and Malnutrition	www.alleviatehunger.org
Literacy	www.litrag.org
Malaria	www.remarag.org
Microfinance and Community Development	www.ragm.org
Multiple sclerosis	www.rotary-rfmsa.org
Peace	www.rotarianactiongroupforpeace.org
Polio Survival	www.rotarypoliosurvivors.com
Population and Development	www.rifpd.org
Preconception Care	knijff44@gmail.com
Water and Sanitation	www.wasrag.org

START A NEW ROTARIAN ACTION GROUP

If your service interest isn't represented by an existing Rotarian Action Group, contact Rotary staff at actiongroups@rotary.org to learn how you can start a new group. All groups are subject to approval by the Rotary International Board of Directors.

EXAMPLES OF ROTARIAN ACTION GROUPS IN ACTION

- The Rotarian Action Group for Population & Development works with Rotary clubs in Germany, Austria, and Nigeria to reduce mortality rates among mothers and newborns at hospitals in rural Nigeria.
- Rotarians for Family Health & AIDS Prevention sponsors an annual event to provide preventive health care services, including HIV testing and counseling, to thousands of people in hundreds of sites across Africa.
- The Rotarian Action Group for Microfinance and Community Development connects Rotary clubs and districts with microfinance institutions to help poor people establish income-generating activities.

RELATED PUBLICATIONS

- *Rotary's Area of Focus*
  www.rotary.org/myrotary/en/document/589
- Rotarian Action Groups Officer Directory
  www.rotary.org/myrotary/en/document/714
- Rotarian Action Groups Annual Report
  www.rotary.org/myrotary/en/document/713
- *Communities in Action: A Guide to Effective Projects*
  www.rotary.org/myrotary/en/document/577
- *Community Assessment Tools*
  www.rotary.org/myrotary/en/document/578

FIND OUT MORE

Email: actiongroups@rotary.org

FACULTY GUIDE

Effective Leadership Strategies

As I further my Rotary journey, I will continue to examine my own leadership style, engage in more complex and skillful use of my leadership skills and seize opportunities to lead.

Session Goals

Build on Insights into Leadership, Team Building and Club Communication in Parts I and II

Improve our ability to lead and communicate in group settings

Identify ways we can win support for our goals and proposals

Materials

◆ **Insert ELS-1**: Effective Leadership Strategies Scenarios

◆ □ **Insert ELS-2**: Building a coalition, (Page 12) Excerpted from Leadership Development: Your Guide to Starting A Program. *250-EN*

Key: ◆ attached insert ● online □ article

Session Topics

1) Exercise in seeking approval of a project by your Rotary Club. See Insert ELS-1, Effective Leadership Strategies Scenarios on page 14.

   a) Develop your strategy. Where do you start?

   Faculty Note: Discuss possible options in getting started, such as:
   - ***importance of pre-planning***
   - ***announcing a plan at a club meeting***
   - ***seeking out an influential member first***
   - ***talking to the club board***
   - ***talking with the president or key officers***
   - ***going to club committee***
   - ***Which approach would be best?***

b) How can you build a coalition for the project?

i) What is a coalition?

ii) How does coalition building work in life experiences, for example, getting support for a proposal at work, a community project, or a political issue or candidate?

c) Practice giving a talk to the club board in support of a project.

2) Why do some people have "influence" and others do not?

a) Is "charisma" important—what is it?

b) How do "titles", i.e., "Boss", "Club President", "Volunteer", fit into influence?

3) What leadership characteristics/behaviors may impede the success of a project or other endeavor. How can you avoid use of those characteristics? Should you?
List on flip chart & discuss:
- ***Seeming elitist,***
- ***pressing ahead without full support,***
- ***seeming arrogant, failure to consult in advance,***
- ***failure to go through the usual process of the organization - such as the relevant committee,***
- ***not considering all the details of a proposal, etc. Discuss each point and how to avoid these mistakes.***

4) See the Scenario about a troubled Rotary club, Insert ELS-1, Scenario 2.
This scenario describes a troubled Rotary Club. Discuss what, if any, are the club's real problems and how leadership can help solve them. Break the class up into three parts (different from previous groups) and ask each group to come up with the problems and proposed solutions. Have a representative of each group report to the whole class. Facilitators should feel free to substitute their own scenarios for this activity or build on previous discussion or issues as appropriate to the culture of their area.

a) What, if any, are the club's real problems?

b) How could leadership help solve them?

c) What leadership strategies do you suggest?

5) Questions & Comments
Summarize and stress the necessity of building coalitions to get things done.

Insert ELS-1: Effective Leadership Strategies Scenarios

Scenario 1:

Rotary Club Vice-President Marvin Montrose is proposing holding an arts and crafts show for his club of 25 members. There has not been such a show in that town in recent memory. He wants to invite crafts persons from the region to come to exhibit and sell their wares. He also wants to invite painters to do the same. He would charge the exhibitors for display tables. Maybe the club members could sell food and drinks to make more money. The site of the show would be the local park in the center of town. It is basically an empty lot with grass. ALL the members would be necessary to help out at the event. The club has never held such a large event in the town of 1500 people. Marvin says that a club committee could work out "details".

What are the issues? Develop a plan and discuss how the group came to its conclusions. Discuss how they can gain acceptance for their plan and have it implemented by the club.

Scenario 2:

The Rotary Club of Milton Crossing has a few active, involved members, but most of the members are apathetic. They come to lunch, often they leave before the program starts, and do nothing else. The membership is 33, down from 62 three years ago. The few active, involved members keep the club going, but they are getting tired of doing all the work. President Maria met with her board and the board listed several problems:

(1) *There are cliques who always sit together at meetings and ignore everybody else. People who wish to sit with them are discouraged.*

(2) *Some of the inactive members are big talkers, but when asked to do something, they fade away.*

(3) *Some members have not been at a meeting for many months, but the club is afraid of losing them if they push attendance.*

(4) *Some members announce loudly that "We don't need more members. We have a happy, friendly group now and more people will disturb that".*

(5) *When two members were asked to sponsor new members, they fired back that "we only want quality members and we have to be very careful…"*

(6) *The President announced that he is having trouble filling the committees, because most people said they were too busy to participate.*

Can this club be saved? Develop a plan and discuss how the group came to its conclusions. Discuss how they can gain acceptance for their plan and have it implemented by the club.

Insert ELS-2: Building A Coalition

BUILDING A COALITION

Building a coalition is the act of finding a solution that satisfies everyone's needs, especially among those who have different viewpoints; it doesn't mean compromise or surrender. Leading others to a coalition results in a decision that is viable and sustainable.

Speaking points

- Define coalition, or share a story of a time you had to bring others together.
- Explain the benefits of open disagreement, which can lead to a better analysis of an issue and allow all parties to express their opinions.
- Discuss the benefits of coalition building, such as helping everyone feel a sense of ownership in the project and disc overing new solutions.
- Outline the coalition-building process:
  1. List what each party wants out of the situation.
  2. Review what is critical for each person and what isn't as critical.
  3. Brainstorm new solutions.
  4. Discuss the outcomes of those solutions.
  5. Rework the solutions and other decisions to meet the critical needs.

Discussion questions

Why is coalition building important in your profession? Your Rotary club?

How do you ensure that a coalition doesn't result in compromise? How do you satisfy everyone involved?

Suggested activities

Group work: Have participants work in small groups on a case study. Assign group members different viewpoints, with one participant acting as a moderator who must build a coalition.

Individual work: Ask participants to reflect on a time when they had to participate in building a coalition. How do they think the process worked and were they satisfied with the result.

FACULTY GUIDE

Attracting Members

I can lead and promote my club's reexamination of its distinctive position in my community and the quality of members we attract.

Session Goals

Define the attributes of a good Rotarian.

Explore how my club can attract good Rotarians.

Materials

- ◆ Insert AM-1: The Membership Process Chart
- ◆ Insert AM-2: Lead Your Club Membership Committee
- ◆ Insert AM-3: Proposing New Members
- ● Classification Survey. 417-EN-(808)
  https://my.rotary.org/en/document/membership-assessment-tools
- ● Clubrunner Club Classification List
  https://clubrunner.blob.core.windows.net/00000050077/en-ca/files/homepage/classification-list/Classification-List-.pdf
- ● Keep Creating Your Membership Development Plan
  https://my.rotary.org/en/document/strengthening-your-membership-creating-your-membership-plan
- ● How to Propose a New Member
  https://my.rotary.org/en/document/proposing-new-members
- ● Creating a Positive Experience for Prospective Members
  https://my.rotary.org/en/document/creating-positive-experience-prospective-members
- ● Introducing New Members to Rotary
  https://my.rotary.org/en/document/introducing-new-members-rotary-orientation-guide

Key: ◆ attached insert ● online □ article

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

Session Topics

1) Where in our community can we find potential "good Rotarians"?
   Have participants list attributes of good Rotarians. You can do this as a large group or break into smaller groups and report out

2) Discuss the make up of your club. Does it reflect your community by ways of age, gender, race, religion, and classification? How can your club attract any missing demographic or classification?
   The responses may be culturally based. Be sure to review the Classification Survey.

3) Discuss how your club should conduct your membership campaign? How does your club attract new members? How do you invite new members?
Develop a good discussion about how they bring in new members. Refer to inserts on the Membership Process and Club Membership Committee.

4) Is your Club welcoming to prospective members? How?

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

Insert AM-1: Good to Know for Attracting Members

- The concept of "attracting members" is that a Rotary club should be vibrant and known in their community, and therefore that it should be attractive to prospective members.

- Membership in a Rotary club is by proposal of a member and invitation by the club.

- Rotary clubs are members of the organization called Rotary International and subject to its charter and bylaws (unless modified) requirements regarding membership.

- Rotary clubs select their own members, but are subject to the laws of their jurisdiction and Rotary policies on membership.

- The 2016 Council on Legislation, "Rotary's Congress" passed several changes allowing clubs to decide what works best for them in the area of attracting members. Some of the changes:

- Clubs can decide to vary their meeting times.

- Clubs decide whether to meet online or in person.

- Clubs decide when to cancel a meeting, as long as they meet at least twice a month.

- Clubs can provide that a service activity or other club function can serve as a meeting.

- Clubs have flexibility in choosing their membership rules and requirements.

- Replaced the previous six membership criteria from the RI Constitution with a simple requirement that a member be a person of good character who has a good reputation in their business or community and is willing to serve the community.

- Rotary continues to promote "New Generations" policies that are targeted toward introducing younger persons to Rotary, including making Rotary membership more convenient and affordable.

- Women have been eligible to join Rotary since 1989. As of 2013, women constitute less than 19% of Rotarians worldwide.

Insert AM-2: Lead Your Club Membership Committee

YOUR JOB AS CLUB MEMBERSHIP COMMITTEE CHAIR

As club membership committee chair, you create and follow an action plan to attract and engage members. Find detailed information in Lead Your Club: Membership Committee.

RESPONSIBILITIES	
ALL COMMITTEES	**YOUR COMMITTEE**
Attend your district training assembly	Educate club members on how to attract new members and keep them involved
Working with the president-elect, select and prepare your committee members	Conduct classification surveys
Create subcommittees as needed (for example, for identifying potential new members, member engagement, new member orientation, mentoring)	Look at your club's meetings, projects, and other activities and assess what it offers new members
Meet regularly and plan activities	Develop a membership action plan to improve member satisfaction
Set committee goals to help achieve the club's goals for the year and monitor progress toward them	Conduct club assessments to ensure that membership development and retention efforts succeed
Manage your committee's budget	Sponsor newly organized clubs in your district, if you choose to
Work with your club's other committees and your district committee on multiclub activities or initiatives	
Report committee activities and progress to the club president, board of directors, and the full club	
Determine what else your club expects your committee to do	

DOWNLOAD THE FULL BROCHURE:
https://my.rotary.org/en/document/lead-your-club-membership-committee

Insert AM-3: Proposing New Members

PROPOSING NEW MEMBERS

New members bring fresh perspectives and ideas to your club, expand your presence in the community, and help ensure your club is strong and vibrant. You've got some great potential members in your area — it's just a matter of finding them. Here are some suggestions to get the conversation started.

SHARE WHAT ROTARY MEANS TO YOU

- Share why you value your Rotary membership:
  - We share common interests and have fun.
  - We make a positive impact in our community through service projects.
  - We're part of a global network of friends.
- Emphasize professional benefits with colleagues:
  - We share business connections and expand our professional networks.
  - We have opportunities to develop professional skills.
- Share Rotary videos and photos of meaningful initiatives with your social media network.
- Wear your Rotary pin to initiate conversations about your involvement with Rotary.

SHARE INFORMATION ABOUT YOUR CLUB AND ROTARY

- Encourage interested prospects to learn more about Rotary clubs and Rotary.org.
- Offer a club brochure that highlights recent service projects and social events.
- Bring them along to a club meeting or your club's information session for prospective members.
- Invite friends, family, co-workers, and colleagues to a club activity or project.

If a prospective member expresses interest in joining your club, make sure they understand expectations of membership, including club fees.

PROPOSE A NEW MEMBER

Once you've found a great candidate, follow your club's process for proposing a new member.

WEB RESOURCES

Need a procedure for proposing new members? Consult the **Manual of Procedure**.

Don't have a club brochure? Create one with a template in **Rotary's Brand Center**.

Find materials and tools to help you bring in members at **www.rotary.org/membership**.

FACULTY GUIDE

Club Communication

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

Session Goals

Understand the elements of effective communication

Apply effective communications to Rotary leadership

Materials

- ◆ ☐ Insert CC-1: Speaker Introduction Guidelines
- ◆ ☐ Insert CC-2: 10 Tips for Public Speaking
- ◆ ☐ Insert CC-3: Internal Communications (case study) Organization
- ● ☐ The 10 Commandments of Communication
  rlifiles.com/files/resource/10_Commandments_of_Communication.pdf

Key: ◆ attached insert ● online ☐ article

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

Session Topics

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

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

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

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

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

Past RI President Glen W. Kinross
— President's Message
The Rotarian, *July 1997*

3) Discuss the following tools for internal and external communication?

Flip chart ideas:

- ***Newspaper***
- ***Internet – Email, Web Sites, Facebook, Twitter, Instagram, YouTube, LinkedIn, etc.***
- ***Television***
- ***Radio***
- ***Billboards***
- ***Club Brochure***
- ***Fundraiser***
- ***Feature Article***

4) Case Study CC-3

- ***Divide into 2 groups: Internal (members) and External (public) audiences.***
- ***Have each group note on a flip chart specific Public Relations ideas and methods of communication for their audience.***
- ***Groups should include types of media to be employed and the essence of each message.***

5) Is there something about your club that the community recognizes? Is it different from the brand of Rotary International? Discuss new logo and the value of including it on all communications.

6) In many communities very few people even know a Rotary Club exists. How can our clubs do better at public relations?

Examples:

- ***Visible, sustainable, hallmark projects;***
- ***promoting club activities and programs in the press;***
- ***signage;***
- ***web presence;***
- ***social networking;***
- ***Rotarians individually keeping Rotary in the forefront of their personal and business life.***
- ***Talk to friends about what you are doing in Rotary***
- ***Talk about how rotary is helping the community***

7) Does your club have a PR chairman? What is their role?
Brand Central - Facilitator should be familiar. Log in at https://my.rotary.org and visit Brand Central

8) How can club members be part of the PR strategy?

From The Club Public Relations Committee Manual, 226C-EN

- ***The role of the club public relations committee is to inform the public about Rotary and promote the club's service projects and activities.***
- ***Having strong public relations ensures that communities around the world know that Rotary is a credible organization that meets real needs.***
- ***When a Rotary club has a positive public image, current members are motivated to be active and prospective members are eager to join.***
- ***The responsibilities of the club public relations committee [are]***
- ***Develop committee goals to achieve the club's public relations goals for the coming year.***
- ***Promote Rotary and your Rotary club in your community.***
- ***Work with Rotarians in your club to maximize public relations efforts.***
- ***Understand the components of public relations that will help you promote Rotary to the community.***
- ***Know Rotary's key messages and be able to use them when speaking in public.***

Communication Practice: Oral

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

Divide the class into groups of 2 (pairs). Have Rotarians interview each other for 5 minutes each. Then, have them each take 2 minutes and introduce each other. Faculty should try to pace the session so that everyone has a chance to give an introduction. Refer to CC-1 for guidelines.

Communication Practice: Written

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

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

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

Wrap-up:

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

Insert CC-1:

INTRODUCING A SPEAKER

Some Things to Think About

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

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

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

Source: Zones 21b/27 Rotary Institute 2014

Insert CC-2: 10 Tips for Public Speaking

Feeling some nervousness before giving a speech is natural and even beneficial, but too much nervousness can be detrimental.

Here are some proven tips on how to control your butterflies & give better presentations:

1. **Know your material.** Pick a topic you are interested in. Know more about it than you include in your speech. Use humor, personal stories and conversational language – that way you won't easily forget what to say.

2. **Practice. Practice. Practice!** Rehearse out loud with all equipment you plan on using. Revise as necessary. Work to control filler words; Practice, pause and breathe. Practice with a timer and allow time for the unexpected.

3. **Know the audience.** Greet some of the audience members as they arrive. It's easier to speak to a group of friends than to strangers.

4. **Know the room.** Arrive early, walk around the speaking area and practice using the microphone and any visual aids.

5. **Relax.** Begin by addressing the audience. It buys you time and calms your nerves. Pause, smile and count to three before saying anything. ("One one-thousand, two one-thousand, three one-thousand. Pause. Begin.) Transform nervous energy into enthusiasm.

6. **Visualize yourself giving your speech.** Imagine yourself speaking, your voice loud, clear and confident. Visualize the audience clapping – it will boost your confidence.

7. **Realize that people want you to succeed.** Audiences want you to be interesting, stimulating, informative and entertaining. They're rooting for you.

8. **Don't apologize** for any nervousness or problem – the audience probably never noticed it.

9. **Concentrate on the message – not the medium.** Focus your attention away from your own anxieties and concentrate on your message and your audience.

10. **Gain experience.** Mainly, your speech should represent *you* — as an authority and as a person. Experience builds confidence, which is the key to effective speaking. A Toastmasters club can provide the experience you need in a safe and friendly environment.

Free resource from www.Toastmaster's.com

Insert CC-3
Internal Written Communication Case Study

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

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

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

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

Group 1:

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

Group 2:

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

FACULTY GUIDE

Team Building

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

Session Goals

Explore How Teams and Team Building are used in Rotary Clubs

Discuss the Advantages and Disadvantages of Teams

Examine Teams as a Tool of Leadership

Examine your own Leadership Style

Materials

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

Key: ◆ attached insert ● online ☐ article

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

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

Session Topics

1) Why should we use team building and committee teams in a Rotary club?
   Is a committee always a team?

2) How can the "Be A Vibrant Club" plan assist us in forming committee teams?

3) How can we make effective use of Rotarian teams and committee teams?
   Use committee structures insert TB-1.

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

4) In the committee, what is the role of the Committee Chair?
Setting the schedule, building team spirit, motivating the team, appropriate delegation.

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

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

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

After completing the chosen exercise, facilitate the following questions among the groups.

a. How was the team leader chosen?

b. Was a team leader necessary?

c. How were the different symbols, colors and designed agreed upon?

d. What special talents did any team member have that helped the process?

e. What methods were used to resolve conflicts?

f . How collaborative was the group effort, or did one or two people decide

g . How was the team spokesperson chosen?

h. What discussions were used in understanding the goal. Was everyone clear on the objective?

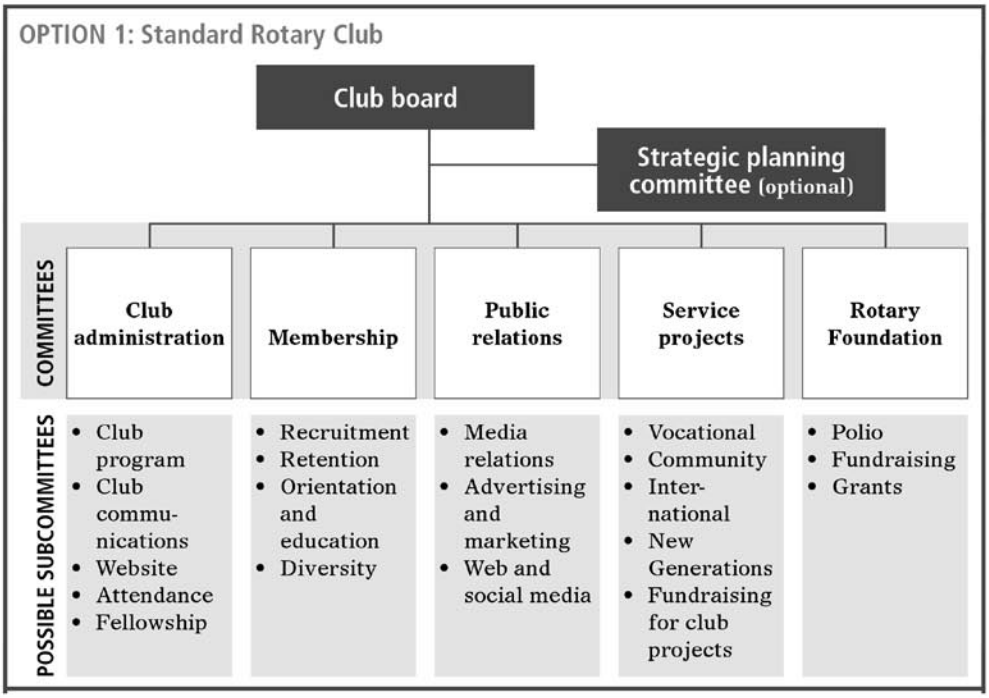
i. How did the time element play in the final decisions that were made?

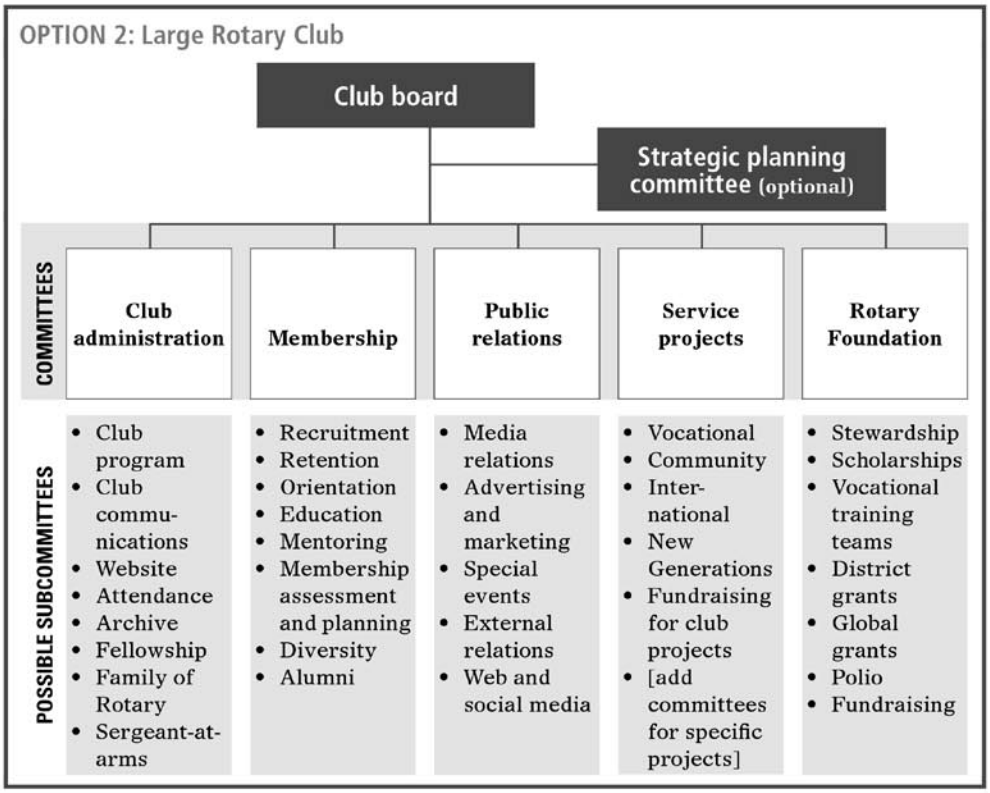
j. What could the team have done to become more effective in its final product?

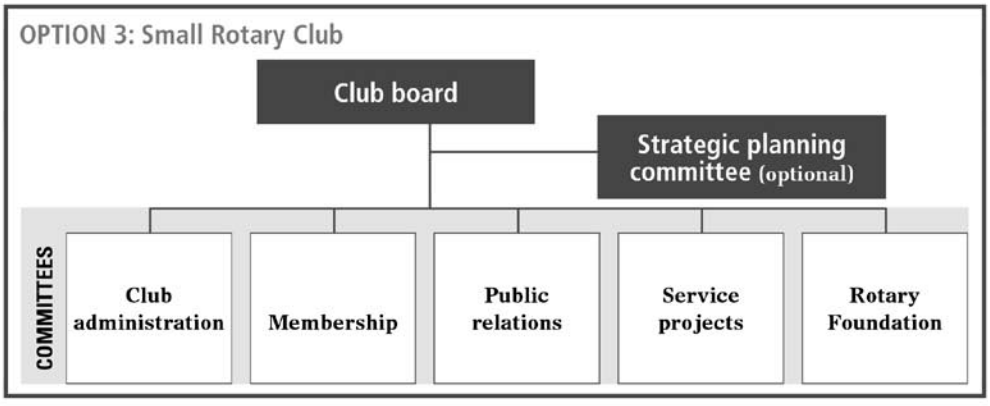
k. How does this exercise relate to committee or team activities at the club level?

Insert TB-1: Club Committee Team Structures

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







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

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

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

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

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

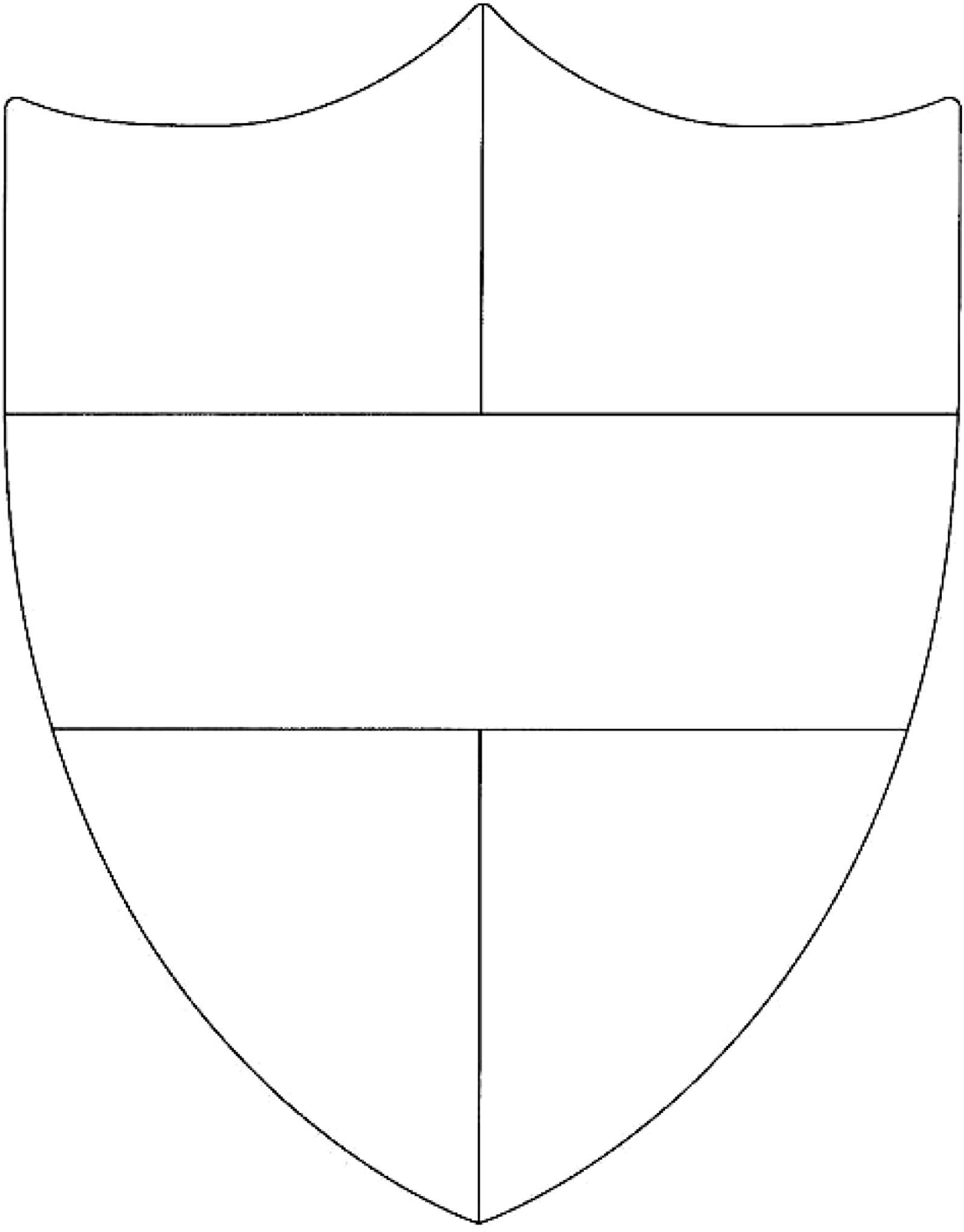
INSTRUCTIONS: Heraldry is the practice of designing, displaying, describing and recording a coat of arms. It is a system of identification that is a very personal and unique form of individual or group expression. A coat of arms is used to illustrate specific characteristics, deeds, accomplishments or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

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

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

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

Club Coat of Arms



Insert TB-3: Urbana University of Illinois Exercise

Background:

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

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

New members were also recruited from the Club program speakers.

Current Situation:

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

Assignment:

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

What specific steps do they need to follow?

FACULTY GUIDE

Foundation II: Targeted Service

I can lead and promote my club's participation in unique, significant and targeted service opportunities through our Foundation.

Session Goals

Review the Rotary Foundation Grant Model

Learn how the Grant Model supports club projects

Learn the role of Rotary's Areas of Focus

Understand the importance of sustainability

Materials

- ◆ Insert TS-1: Foundation Grant Model
- ◆ Insert TS-2: Share System & Foundation Funding
- ◆ Insert TS-3: What is Sustainability?
- ◆ Insert TS-4: Grant Model Flowchart
- ◆ Insert TS-5: Case Studies
- ◆ Insert TS-6: Areas of Focus
- ● □ Rotary Foundation Reference Guide *219-EN (114)*
  http://rlifiles.com/files/resource/Quick_Ref_Guide_219en.pdf
- ● Learning & Reference page at Rotary.org
  https://www.rotary.org/myrotary/en/learning-reference

Key: ◆ attached insert ● online □ article

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

Session Topics

1) Let's take a brief look at the Mission of our Rotary Foundation:

   Review from Part I: Our Foundation. The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

2) What are the categories of grants in the Foundation Grant Model? How can each grant type be used?
   See Insert TS-1. Discuss each type of grant and how each one can affect your club.

3) Divide the class into two groups to review and discuss the Case Studies in Insert TS-5. Group discussions should consider the questions set out in the Case Studies. Groups report their responses and class discussion follows.
Optional exercise: Divide the class into three groups and assign one group to become "expert" on the Grant Model Flowchart (TS-4), one group to become "expert" on Sustainability (TS-3), and one group to become "expert" on the Six Areas of Focus (TS-6). Each group answers the applicable question for each.

4) Let's take another look at the six areas of focus. Why are they important?
See Insert TS-6 Areas of Focus
The Six Areas of Focus are: (a) Peace and conflict prevention/resolution, (b) Disease prevention and treatment, (c) Water and sanitation, (d) Maternal and child health, (d) Basic education and literacy, (e) Economic and community development.

The Six Areas of Focus are important because: (a) they reflect critical humanitarian issues and needs worldwide, (b) Rotarians are already addressing them, (c) they align Rotary with other international developmental efforts, and (d) it strategically furthers the mission of The Rotary Foundation. See Insert TS-6: The Areas of Focus Chart.

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

5) One of the questions asked in the Case Studies is: "Is the grant sustainable?" What do you think is meant by "sustainable"? What is the value of sustainability in projects?
See Insert TS-3: What is Sustainability? Lead a discussion for this question.

From The Rotary Foundation Resource Guide: For The Rotary Foundation, sustainability means providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends. Global grant projects must be sustainable and display the following characteristics:

1. ***Community needs — The host community and Rotary project sponsors develop projects based on the community's assessment of its needs and strengths.***
2. ***Appropriate technology — Project materials are appropriate for the community and, ideally, are purchased locally.***
3. ***Sustainable funding — The community is able to sustain the project without ongoing financial support from The Rotary Foundation or other Rotary sources.***
4. ***Knowledge transfer — The project includes teaching beneficiaries how to address their ongoing needs after the project is completed.***
5. ***Motivation — The community is able to assume ownership of the project upon its completion.***
6. ***Monitoring and evaluation — The project includes a measurement plan to confirm significant improvement, ideally for at least three years.***

Optional exercise: Divide the class into four groups, if size permits, and ask attendees to apply the four areas of sustainability in Insert TS-3 to the case studies. If there are four groups, ask each group to take one of the four areas of sustainability (economic, cultural, social, environmental) and determine whether the projects in the Case Studies are sustainable.

Follow-up question to be asked of entire class: What does this tell you about "sustainability?" Possible response: It's difficult to define, can have many different meanings in different situations. For example, a project that might last for several years could be so damaging to the environment that it is not "environmentally sustainable."

6) One of the requirements for a Global Grant is that a community needs assessment be conducted. Why do you think a community needs assessment is required? Why is it important? How would you conduct a community needs assessment for a possible project in a county thousands of miles from your own club?
Facilitators should review ahead of time and be familiar with the Global Grants Community Assessment Results to familiarize themselves with the requirements for community needs assessments.

Suggested responses included:
- ***Ownership on the part of the beneficiaries: Community engagement is increased when community members representing various parts of the beneficiary community are included in discussions***
- ***Project planners learn about the reasons for the project: Community members share how the needs impact the quality of life for the larger community.***

Note that Rotary and The Rotary Foundation use the term "partner" in many different contexts, from our "partners" in the polio eradication effort, to encouraging clubs to develop "partners" in their community to support their activities and projects.

Example of how a needs assessment avoids projects that "look" perfect:

A university in the USA developed a well-researched plan for introducing a new farming program to areas where weather extremes (drought or extreme heat) made subsistence farming difficult and where the community was isolated, limiting opportunities for sale of locally made articles.

A Rotary club in the USA learned of the plan and saw an opportunity to assist rural "ejidos" in Mexico develop a low-cost sustainable business model by providing local farmers with breeding rabbit pairs, allowing the beneficiaries to breed the rabbits, sell the offspring to other farmers, and at the same time grow the food supply and improve the health of the local communities. The project was not discussed with the potential beneficiaries, nor the local Rotary club – the theory was that once the rabbits were introduced to the farmers of the ejidos and they were trained in rabbit farm management, the project would be successful.

Only one problem existed that made long-term success unlikely: The local residents of the ejidos refused to eat rabbit meat!

7) Breakout and Consider the Case Studies.
Suggested Facilitation Technique. Divide into groups of about 3-4 participants each and assign the case studies. Have them refer to the Inserts TS-4 Grant Model Flowchart, TS-2 SHARE Flowchart, TS-6 Areas of Focus Chart & TS-3 What is Sustainability? Have a different people in the group report on each question, including the case summary. Alternate division would be for each in group to explain how they analyzed their case study using a specific Insert. Give adequate time for reporting back to the entire group. Sub-groups can be combined into 2 larger groups, one for each case study, to compare results before presentation. Tie in these projects to Q9.

8) How can the Grant Model encourage Rotarians to participate and contribute?
Through Rotary Foundation participation and support, your club can make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and keep members. When Rotarians experience Foundation programs directly, they can be inspired to contribute to The Rotary Foundation. See Q3 for Club and District benefits. A program where decisions are made by district or club level Rotarians, that are simple enough to understand, that are more effective, and that Rotarians know about because of surveys and continued education, are more likely to engage Rotarians to participate and support.

9) Can the Grant Model help a club's public image?
Programs that are effective, make a big difference in the outcome for others, and are easy to explain can be more readily and effectively communicated to others, whether inside the club, or outside the club. Those in the media are interested in a big story with local involvement.

Note for discussion leaders: Annual Fund contributions will fund project costs after the three year investment cycle, some will fund operations. In "THE DETAIL" on Insert TS-2: Share Flowchart, it is explained as follows: "The World Fund would be reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund." More information on the changes is detailed in the Rotary Foundation published flyer entitled "Securing our Foundation's Future" published April, 2014. RLI Faculty are encouraged to read this document and update this information for more recent changes, as more changes may occur. Participants should be encouraged to consult with their District Foundation leadership if they have any more detailed questions.

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

- ***Summarize that Goals of Session have been met and how: Discussed:***
  - ***Reviewed the Grant Model***
  - ***Discussed the importance of the Grant Model to your Club***
  - ***Discussed the concepts of the Areas of Focus and Sustainability***
- ***In the Our Foundation session in Part I, we hope you were inspired by the great things that our Rotary Foundation is doing in the world.***
- ***In this session, our overarching goal is to provide you with some of the terminology, tools, key concepts and methods of the Grant Model.***
- ***Projects that you start in your club can turn into the next Polio Eradication Campaign, or can spread across a continent to give people less fortunate than we are clean water, education, or a chance at a better life.***
- ***Now that you know what is available, we encourage you to use those tools, learn more from your district grant seminars, develop your Rotary contacts, and get out there are start doing the work of Rotary- "Doing Good in the World".***
- ***In a world filled daily with bad news of poverty, crime, and misfortune, we are a force for good in the world. We are making a difference. You are making a difference.***

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

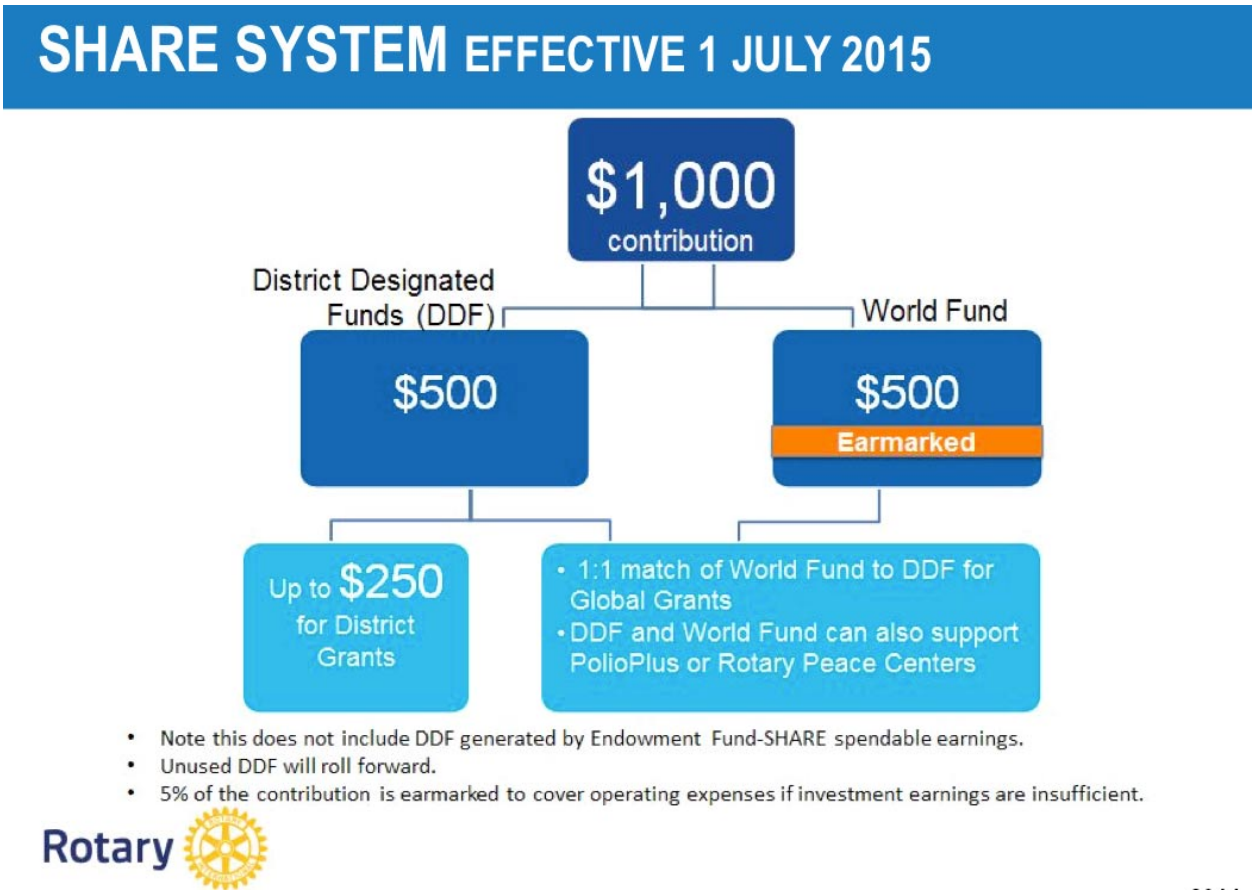
Insert TS-1: Foundation Grant Model

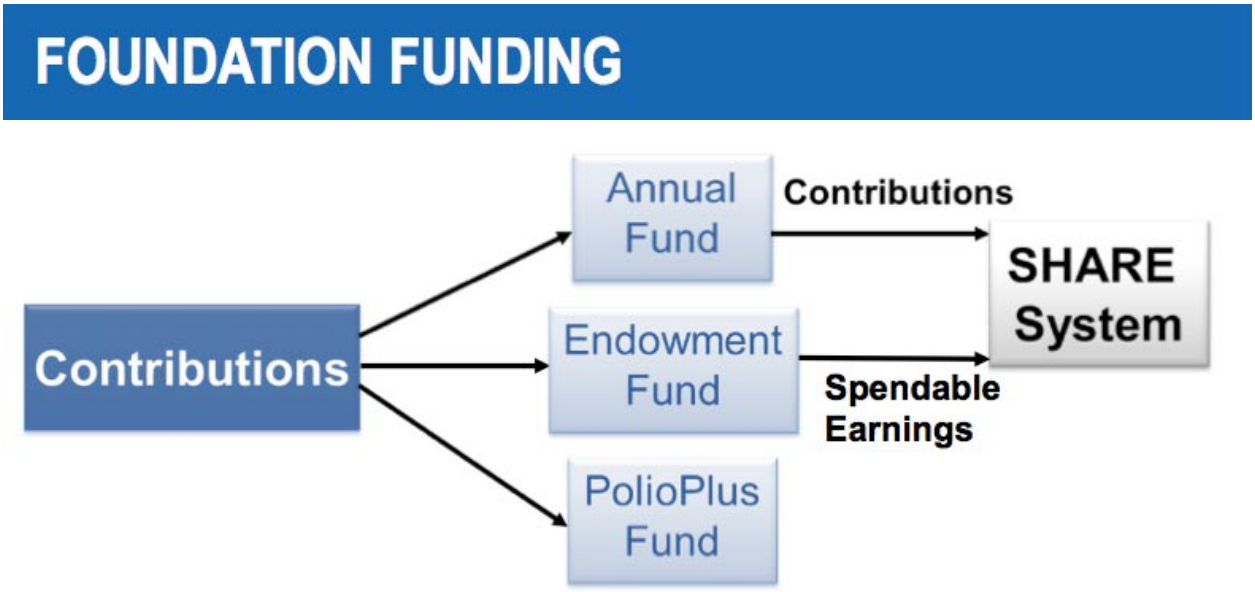
District Grants	Global Grants
Fund small-scale, short-term activities that address needs in your community and communities abroad. Each district chooses which activities it will fund with these grants.	Support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. Grant sponsors form international partnerships that respond to real community needs.
Humanitarian projects, including service travel and disaster recovery efforts; Scholarships for any level, length of time, location, or area of study; Vocational training teams.	Requires clubs in two countries. Funds Scholarships, humanitarian projects, and vocational training.

Note on District Grant Changes: District Grants (but not Global Grants) can now additionally fund (a) Rotary Youth Exchange, RYLA, Rotaract or Interact, (b) Construction, including low cost shelters, (c) Travel for staff of cooperating organizations, (d) Activities primarily implemented by an organization other than Rotary. Further, educational and humanitarian training events are now allowable. (April 2014, Trustee Decision 96)

*A community need assessment is required.

Insert TS-2: Share System & Foundation Funding

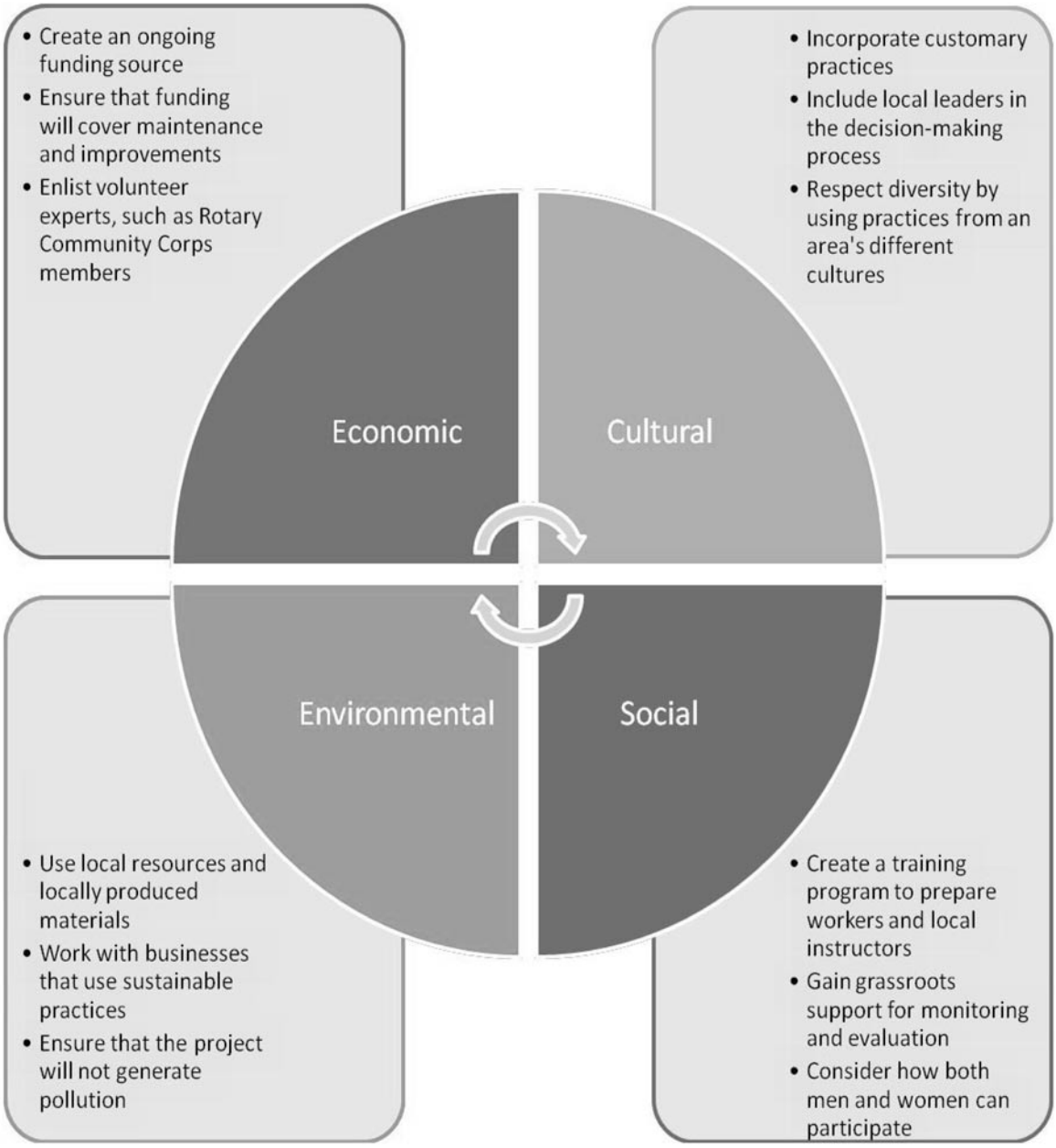




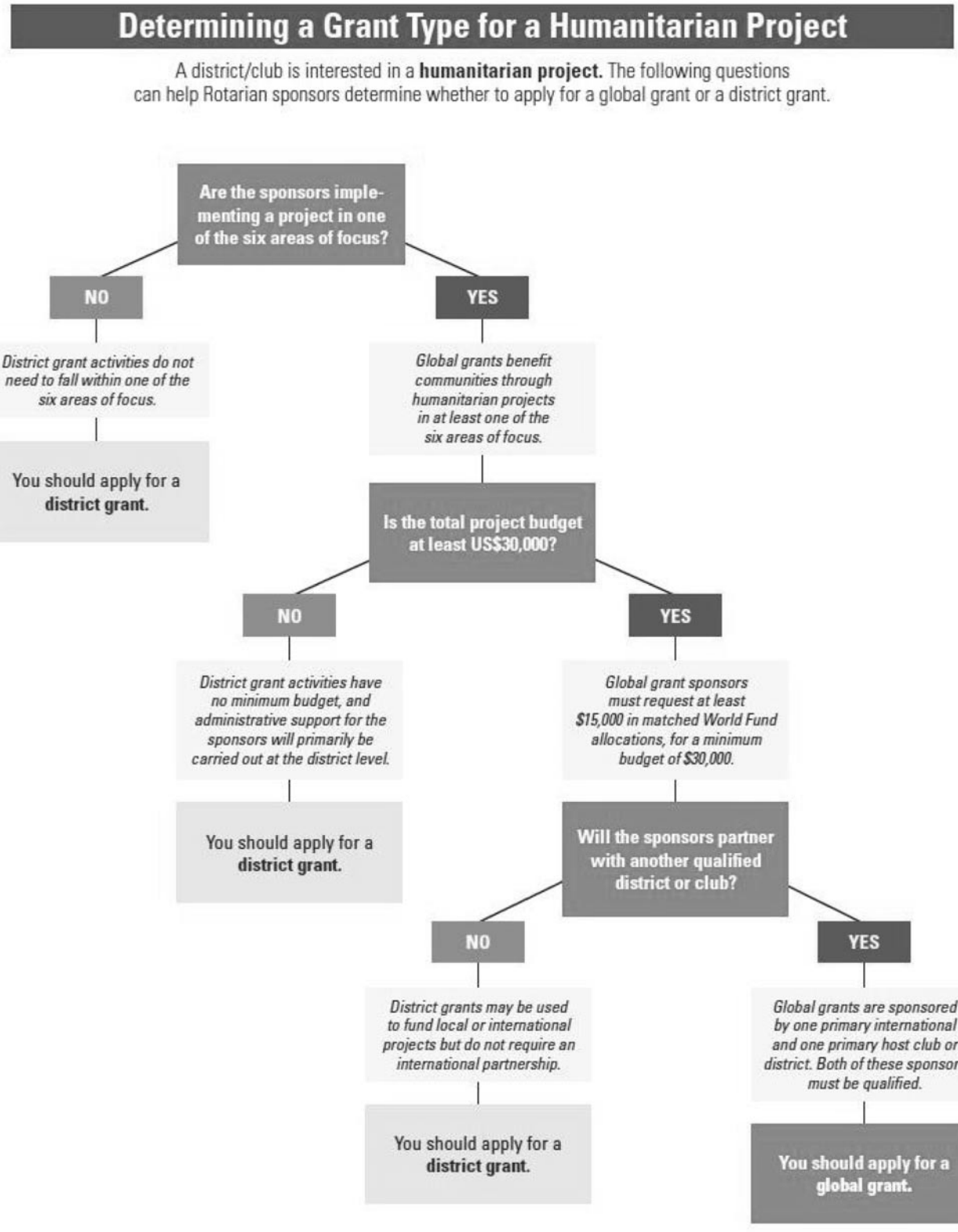
THE DETAIL. How does the SHARE System work? Annual Fund contributions are invested for a three year period. In the third year, the money is divided 50/50 between the district and the World Fund (WF). The district's part of the funds are called "District Designated Funds" (DDF). Districts can use up to 50% of their DDF to pay for club and district projects through District Grants. The remaining DDF may be used for Global Grants or donated to PolioPlus, the Rotary Peace Centers, or another district. If DDF is not used in a given year, then it accumulates in the district's account and may only be used thereafter for Global Grants. World Fund contributions are used to match Global Grants and formerly to fund Packaged Grants*. The World Fund matches DDF (1:1), and cash (0.50:1), for contributions to a Global Grant. District Grants can be any amount while Global Grants must be at least $30,000 USD. The World Fund would be reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund.

Insert TS-3: What Is Sustainability?

The word sustainable often describes something that is environmentally friendly. But environmental concerns are just one aspect of sustainability. Economic, cultural, and social factors are equally important. When a humanitarian project addresses all four levels of sustainability, it has a better chance of producing long-term benefits for the community it serves. Here are examples of ways to incorporate sustainability into your next project. [From *The Rotarian*, Feb. 2012]



Insert TS-4: Grant Model Flowchart



Ref: TRF Training Workbook Jan 2013 17-19 San Diego CA USA

Insert TS-5: Targeted Service Case Studies

Case Study A

John and Mary come to live in a new country where they do not speak the local language. They find it difficult to fit into the community. They attend the local schools but have limited resources for individual language training. Their parents speak only their native language increasing the sense of isolation for the whole family.

This is one family but there are many families with the same issues in the community. Your Rotary Club has decided to supply bilingual dictionaries as needed to all the local schools. It is determined that there are 300 students in the schools in the 5th grade. Each dictionary costs US $5.

Conduct small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

Each group reports back to the whole group on each question explaining their reasoning for their answers.

Case Study B

The residents of Patari, a village in Uttar Pradesh, are among 25 million people in India who suffer the consequences of fluorosis, an irreversible condition caused by elevated levels of fluoride in drinking water. The painful effects of fluorosis can include bone deformities, calcification of ligament and tendons, and osteosclerosis (abnormal bone density). Dental effects include mottling and erosion of tooth enamel. The fluoride, because of its strength, rots teeth and destroys bones. Your district would like to work with the district in India to provide fluoride filters to 60 families in Patari through a Rotary Foundation grant-funded project. The US $40,000 project also provided toilets, safe drinking water, and hygiene training to eight schools serving about 2,300 students in Uttar Pradesh.

The World Health Organization estimates that almost one-tenth of global disease could be prevented by improving the water supply, sanitation, hygiene, and the management of water resources. As the Indian villages demonstrate, the solution requires a targeted approach, including assessments of each community's needs.

Small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

Each group reports back to the whole group on each question explaining their reasoning for their answers.

Insert TS-6: The Rotary Foundation Areas of Focus

We have identified specific causes to target to maximize our local and global impact. At the same time, we understand that each community has its own unique needs and concerns.

Through global grants and other resources, we help clubs focus their service efforts in the following areas.

Promoting peace

Today, 65 million people are displaced by armed conflict or persecution. Through our partnerships with several leading universities, Rotary Peace Fellows develop the skills to strengthen peace efforts, train local leaders to prevent and mediate conflict, and support long-term peace building in areas affected by conflict. We provide up to 100 peace fellowships per year at Rotary Peace Centers.

Fighting disease

More than 100 million people are pushed into poverty each year because of medical costs. We aim to improve and expand access to low-cost and free health care in underdeveloped areas. Our members educate and mobilize communities to help prevent the spread of major diseases such as polio, HIV/AIDS, and malaria. Many of our projects ensure that medical training facilities are located where the workforce lives.

Providing clean water

More than 2.5 billion people lack access to adequate sanitation facilities. At least 3,000 children die each day from diarrheal diseases caused by unsafe water. Our projects give communities the ability to develop and maintain sustainable water and sanitation systems and support studies related to water and sanitation.

Saving mothers and children

At least 7 million children under the age of five die each year due to malnutrition, poor health care, and inadequate sanitation. To help reduce this rate, we provide immunizations and antibiotics to babies, improve access to essential medical services, and support trained health care providers for mothers and their children. Our projects ensure sustainability by empowering the local community to take ownership of health care training programs.

Supporting education

Sixty-seven million children worldwide have no access to education and more than 775 million people over the age of 15 are illiterate. Our goal is to strengthen the capacity of communities to support basic education and literacy, reduce gender disparity in education, and increase adult literacy.

Growing local economies

Nearly 1.4 billion employed people live on less than $1.25 a day. We carry out service projects that enhance economic and community development and develop opportunities for decent and productive work for young and old. We also help strengthen local entrepreneurs and community leaders, particularly women, in impoverished communities.