



A Joint Project of over 400 Rotary Districts worldwide

2021-23

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.**

2021-2023 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 Action Plan https://my.rotary.org/en/document/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://rghf.org/
	● 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?

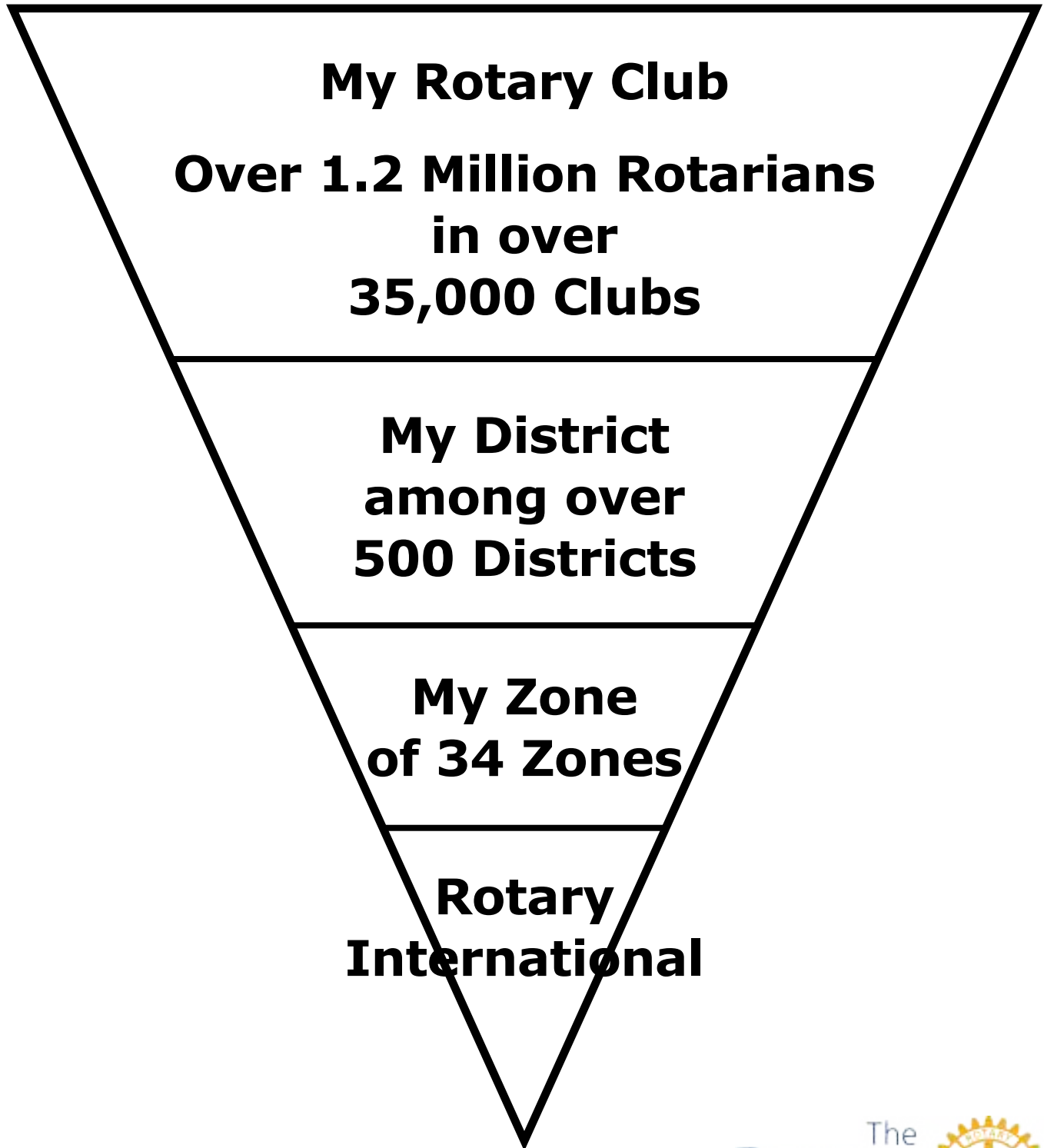
Zones were created by Rotary International to serve as geographical areas for the election of R.I. Directors. The R.I. Board has also used zones for the appointment of R.I. officers noted in paragraph 2.

- 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 or use Googles to find the site.

Insert MRW-1: My Rotary World



ROTARY'S VISION STATEMENT

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

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

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

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

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

EXPAND OUR REACH

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

ENHANCE PARTICIPANT ENGAGEMENT

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

INCREASE OUR ABILITY TO ADAPT

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

ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP


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



rotary.org/actionplan

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?	◆ □ Insert EVS-1: The Guiding Principles of Rotary
What are the Values we Share?	◆ □ Insert EVS-2: Vocational Service Ideas
How do these Values relate to me and my club?	◆ □ Article: The Four Way Test Means Business
	● □ http://rlifiles.com/files/resource/Four_Way_Test_Means_Business.pdf
	● □ 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

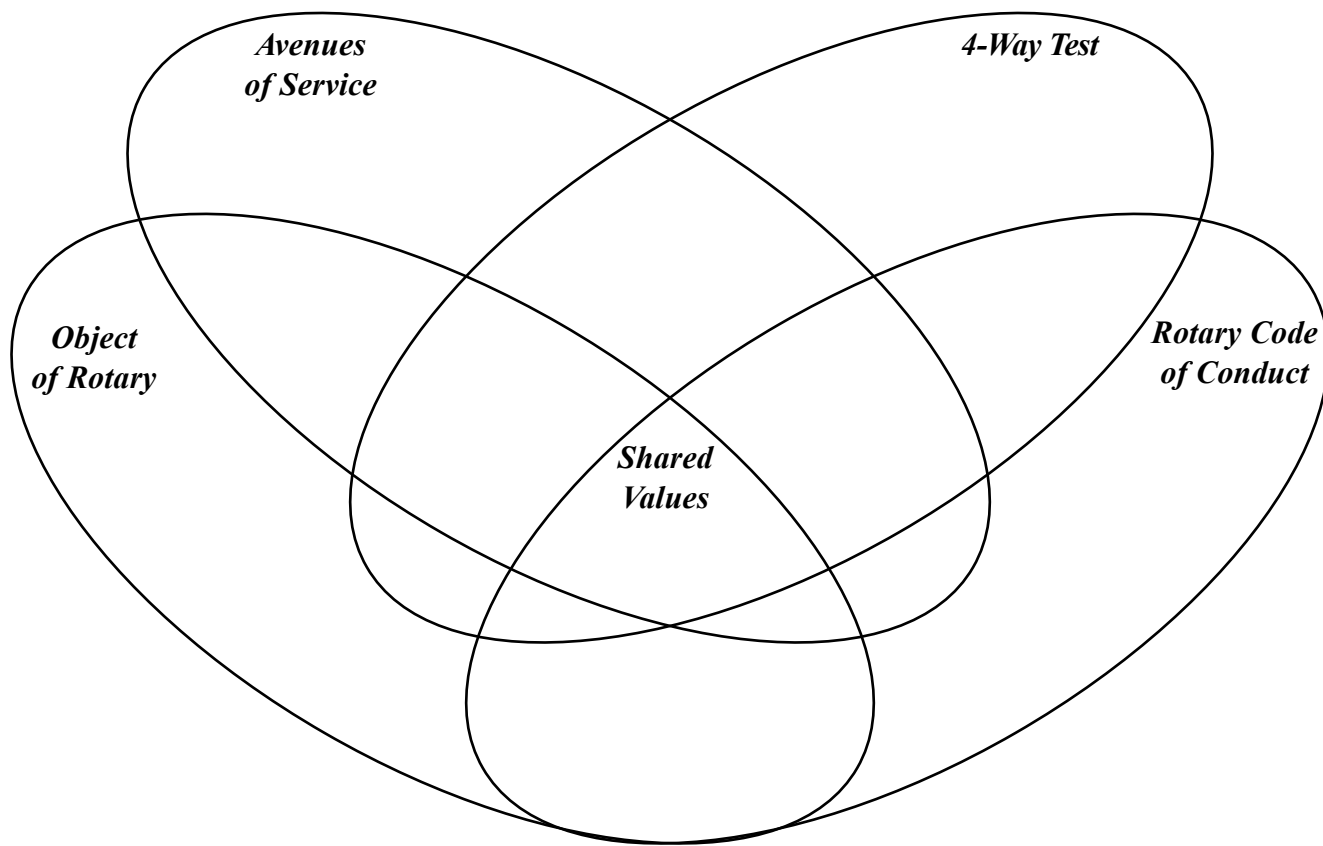
2) Refer to Insert EVS-1: The Guiding Principles of Rotary. For your assigned principle, develop 3 value "key words" best describing the principle. Insert your value "key words" in the box below.

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. 5. Help maintain a harassment-free environment in Rotary meetings, events and activities; report any suspected harassment; and help ensure non-retaliation to those individuals that report harassment.

Insert EVS-2: Vocational Service Ideas

1. Advancing high ethical standards in the workplace
 - a. In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
 - b. In internal communications, praise and encourage exemplary behavior on and off the job.
 - c. In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.
2. The classification principle
 - a. Classification talks to promote vocational awareness in your club.
 - b. Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
 - c. Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.
 - d. Schedule an occasional meeting in a member's place of employment.
 - e. Invite young people to special vocational meetings.
3. Promote Rotary's commitment to high ethical standards
 - a. Post The Four-Way Test on a prominent billboard in your community.
 - b. Display The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or 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 Showcase to identify a project in need of your specialized vocational skills.

Foundation I: Our Foundation



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

Session Goals

Understand the Basic Goals, Programs & Financing of our Rotary Foundation

Discuss the Importance & Value of our Rotary Foundation to your Club

Need for each Rotarian to make TRF their charity of choice

The Mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill & peace through the improvement of health, the support of education and the alleviation of poverty.

Materials

- ◆ OF-1: Exemplary Global Grant Projects
- ◆ OF-2: Areas of Focus
- ◆ OF-3: Foundation Facts—Giving 159-EN (1113), Graphics <http://www.rotary.org/en/document/12436>
- ◆ OF-4: Charity Navigator Rating
- ◆ OF-5: Donor Recognition Page <https://www.rotary.org/en/donate/recognition>
- OF-6: Rotary Direct commitment form <https://my.rotary.org/en/document/rotary-direct-rotarys-recurring-giving-program-form>
- Rotary Foundation Reference Guide 219-EN (1012) <http://www.rotary.org/en/document/518>
- Connect for Good (formerly Rotary Basics) <https://www.rotary.org/myrotary/en/document/connect-good>
- Rotary Learning Center
- ◆ attached insert ● online article

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.**

- 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.



Exemplary Global Grant Projects

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

1. Equipping a neonatal intensive care unit in Brazil

Area of focus: Saving mothers and children

Host sponsor: Rotary Club of Registro, Brazil

International sponsor: Rotary Club of Nakatsugawa, Japan

Total budget: \$172,500

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

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

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

2. Supporting Rotary Family Health Days in Uganda

Area of focus: Saving mothers and children

Host sponsor: Rotary Club of Kiwatule, Uganda

International sponsor: District 5500 (Arizona, USA)

Total budget: \$97,750

Background: A health care summit in Uganda, funded by a district grant, uncovered a need for improved prenatal diagnostic capabilities in rural communities and for better nutrition for expectant mothers.

Scope: A combination global grant provided humanitarian supplies for Uganda’s Rotary Family Health Days and a vocational training team for health care workers at the health camps.

Impact: The team trained 23 nurses, midwives, and other health care practitioners to use ultrasound scanning devices to diagnose abnormalities in pregnancies and other life-threatening conditions.

Fun fact: Ten Rotary clubs in Uganda each adopted a rural health care center.

3. Collecting donated human milk for new born in the Philippines

Area of focus: Saving mothers and children

Host sponsor: Rotary Club of Chinatown-Manila, Philippines

International sponsor: Rotary Club of Tomobe, Japan

Total budget: \$82,000

Background: The Rotarians conducted a community needs assessment and decided to fund the creation of a human milk bank at a hospital in Manila.

Scope: The facility collects, screens, processes, and distributes milk to premature and sick newborns, and to well babies whose mothers cannot provide their own breast milk, at Justice Jose Abad Santos General Hospital. It will also supply milk to infants in communities affected by natural disasters throughout the country.

4. Training young community leaders in Guatemala

Area of focus: Promoting peace

Host sponsor: Rotary Club of Valle de Guatemala, Guatemala

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

Total budget: \$39,873

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

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

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

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

5. Teaching peaceful problem-solving in Israel

Area of focus: Promoting peace

Host sponsor: Rotary Club of Haifa, Israel

International sponsor: Rotary Club of Coral Springs-Parkland, Florida, USA

Total budget: \$161,750

Background: Israel faces challenges with water scarcity and ongoing conflict.

Scope: This water project has a “hidden” peace component: Water challenges form the basis of a science curriculum that helps schoolchildren from different backgrounds in Haifa find solutions peacefully and creatively.

Impact: Students from 10 schools worked together to present 38 science projects focused on water and sanitation. One project involving students from three schools won first prize in a national competition. Schools also participated in 15 cross-cultural activities.

6. Bringing clean water to public schools in Lebanon

Area of focus: Providing clean water

Host sponsor: Rotary Club of Baabda, Lebanon

International sponsor: Rotary Club of Kernersville, North Carolina, USA

Total budget: \$43,550

Background: Municipal water supplies in Lebanon are often tainted because of deteriorating infrastructure, so most people buy bottled water for drinking. Many public schools collect rainwater in rusty tanks, leading to contamination, illness, and missed school days. The influx of refugees from Syria has made schools even more crowded and created an even greater need for clean water.

Scope: This grant supplied new water tanks, pipes, filters, and faucets to 19 schools; it also provided hygiene training.

Impact: Now, 6,743 children have access to clean water and the project is being replicated throughout the country. Rotarians in Lebanon aim to bring clean water to every public school – totaling more than 1,000.

7. Providing safe water for rural communities in Peru

Area of focus: Providing clean water

Host sponsor: Rotary Club of Cajamarca Layzón, Peru

International sponsor: District 2201 (Spain)

Total budget: \$258,195

Background: Before the project, residents drank untreated spring water, and the rate of intestinal and respiratory diseases, especially among infants and the elderly, was high.

Scope: The project repaired 32 reservoirs and installed gravity-fed drip chlorination systems for drinking water. The Rotarians also trained residents to administer and maintain the system.

Impact: More than 10,000 people, including 1,138 children under age four, now have clean drinking water.

Fun fact: The Rotary Club of Cajamarca Layzón has only 11 members; this was its first global grant.

8. Improving sanitation and hygiene training in Benin

Area of focus: Providing clean water

Host sponsor: Rotary Club of Abomey-Calavi, Benin

International sponsor: District 2080 (Italy)

Total budget: \$158,999

Background: The village of Paouignan needed improved clean water infrastructure.

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

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

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

9. Bringing basic sanitation to a remote village in Colombia

Area of focus: Providing clean water

Host sponsor: Rotary Club of Cartagena de Indias, Colombia

International sponsor: Rotary Club of Los Angeles, California, USA

Total budget: \$38,507

Background: Sanitation facilities in the village of Leticia were nonexistent; residents had to relieve themselves outdoors. Environmental contamination and lack of hygiene contributed to illness among people in the village.

Scope: The Rotary Community Corps in Leticia proposed a project to provide bathrooms – each including toilet, shower, sink, and septic tank – to 25 of the village’s 75 homes.

University students and Rotarians trained residents in hygiene, food handling, and waste management.

Fun fact: A nearby village has asked the Rotarians to organize an RCC there.

Top tip: Work with an RCC; talk with clubs that have done a similar project; form strategic alliances with universities, local companies, and government officials; and actively involve local Rotary members.

10. Improving literacy in Guatemala

Area of focus: Supporting education

Host sponsor: Rotary Club of Guatemala Vista Hermosa, Guatemala

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

Total budget: \$339,191

Background: The Guatemala Literacy Project is a 20-year partnership between Rotary clubs and districts and the nonprofit Cooperative for Education.

Scope: This global grant provided textbooks, computer labs, teacher training, and scholarships to impoverished schools. The sustainable model requires families to pay a fee to rent the donated textbooks; schools use the money to buy new books when the old ones wear out.

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

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

11. Providing equipment for indigenous farmers in Paraguay

Area of focus: Growing local economies

Host sponsor: Rotary Club of Asunción, Paraguay

International sponsor: Rotary Club of Flensburg, Germany

Total budget: \$52,500

Background: Indigenous residents of the village of El Paraiso, 300 miles north of the capital, Asunción, relied on subsistence farming.

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

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

12. Screening for breast cancer in Turkey

Area of focus: Fighting disease

Host sponsor: Rotary Club of Adana, Turkey

International sponsor: Rotary Club of San Antonio, Texas, USA

Total budget: \$38,000

Background: In Turkey, breast cancer is the eighth most common cause of death. Early detection is key to effective treatment, but women in rural areas have little access to, or education about, screening.

Scope: Working with local officials, Rotarians provided breast models that health workers use to explain the effects of breast cancer and to demonstrate how women can detect signs of the disease. Rotarians and the Public Health Directorate worked together to organize breast cancer awareness events in 15 districts of Adana, a city in southern Turkey.

13. Fighting cervical cancer in rural Bangladesh

Area of focus: Fighting disease

Host sponsor: Rotary Club of Padma Rajshahi, Bangladesh

International sponsor: Rotary Club of North Columbus, Georgia, USA

Total budget: \$59,500

Background: Bangladesh ranks fourth in the world in deaths from cervical cancer.

Prevention and early detection can lead to higher survival rates.

Scope: Project sponsors worked with the Rajshahi Cancer Hospital and Research Center to reduce the incidence of cervical cancer through vaccinations. They also worked to raise awareness about symptoms and funded training for female paramedics in 10 villages around Rajshahi.

Impact: Nearly 1,000 girls and women ages nine to 45 participated in the program.

Fun fact: Response to the program was stronger than anticipated; the Rotarians plan to include more villages in a future project.

14. Taking cancer screening on the road in India

Area of focus: Fighting disease

Host sponsor: Rotary Club of Madras East, India

International sponsor: Rotary Club of San Antonio, Texas, USA

Total budget: \$70,242

Background: India has more than 800,000 new cases of cancer every year; many people, especially in rural areas, are not aware of, cannot afford, or are afraid of screening for the disease. Late diagnosis of breast and cervical cancer leads to high mortality rates.

Scope: Rotarians identified a significant public health problem in their area, then found a strong cooperating organization to work with. They helped design a special vehicle to bring screenings to women in rural areas and mobilized their networks to ensure that the mobile unit would reach as many women as possible.

Impact: 3,650 women were screened during the project.

Top tip: Cooperate with an organization that is already experienced in the work your club plans to focus on.

15. Equipping a specialized medical center in New York state

Area of focus: Fighting disease

Host sponsor: Rotary Club of Burnt Hills-Ballston Lake, N.Y.

International sponsor: Rotary Club of Luanshya, Zambia

Total budget: \$34,650

Background: Children in need of comprehensive services to correct cleft craniofacial abnormalities had to travel several hundred miles to Boston or New York City.

Scope: The grant funded specialized equipment, supplies, and educational materials for doctors and families at the Albany Medical Center, which serves an area of 15 million people.

Fun fact: This was the New York club and district's first time sponsoring a global grant whose beneficiaries were in the United States.

16. Improving health services in Nepal with a VTT

Area of focus: Fighting disease

Host sponsor: Rotary Club of Patan West, Nepal

International sponsor: Rotary Club of Amagasaki West, Japan

Total budget: \$33,781

Background: Rotarians in District 2680 (Japan-Hyogo) have supported the Dr. Iwamura Memorial Hospital in Bhaktapur, Nepal, since it was established in 1998. Every month, the hospital treats 225 patients for emergency care and 1,300 outpatients. Rotarians saw a need for improved quality of services.

Scope: A vocational training team of an administrator and three nurses from the hospital received training on emergency care and dialysis treatment at Okamoto Hospital in Hyogo prefecture.

Impact: The training team members observed how Japanese hospitals receive and treat patients, learned best practices for infection management and safety procedures, and gained skills in dialysis treatment and the use of other advanced medical equipment.

17. Bridging the health care gap in Mongolia with smartphones

Area of focus: Fighting disease

Host sponsor: Rotary Club of Khuree, Mongolia

International sponsor: Rotary Club of Cheonan-Dosol, Korea

Total budget: \$50,000

Background: More than 300 villages in Mongolia are so remote that access to advanced health services is limited.

Scope: Doctors in 55 villages received smartphones and training in a tele-dermatology system through a user-friendly app.

Fun fact: The app was developed in Mongolia.

18. Fighting malaria with mosquito nets in Venezuela

Area of focus: Fighting disease

Host sponsor: Rotary Club of Puerto Ordaz, Venezuela

International sponsor: Rotary Club of Key Biscayne, Florida, USA

Total budget: \$77,500

Background: Venezuela is facing a malaria epidemic, with the eastern city of Sifontes at the epicenter. Rotarians already had relationships with area residents thanks to a previous Matching Grant project.

Scope: The project distributed 6,000 insecticide-treated bed nets to indigenous communities around Sifontes and provided instructions on how to use them. Local young people, including

Rotaractors and indigenous representatives, received training on how to perform house-to-house follow-up visits.

Impact: New malaria cases have been reduced by 60 to 80 percent. Sponsors hope to build on this success in Venezuela and are working on a similar project in Peru.

Fun fact: The project provides custom-made bed nets designed to work with the traditional hammocks used by people in the indigenous communities.

19. Mobilizing rural medical care in Mexico

Area of focus: Fighting disease

Host sponsor: Rotary Club of San Nicolás de los Garza, Mexico

International sponsor: Rotary Club of Austin, Texas, USA

Total budget: \$50,000

Background: Isolated rural communities lack access to medical care.

Scope: Rotarians, through a series of global grants, donated mobile health units with medical and dental supplies to a fleet staffed by partner organization *Cáritas de Monterrey*.

Impact: More than 5,000 people now have access to medical care.

Fun fact: The Rotary clubs of San Nicolás de los Garza and Austin have been twin clubs for nine years.

20. Fighting dengue fever in Indonesia

Area of focus: Fighting disease

Host sponsor: Rotary Club of Solo Kartini, Indonesia

International sponsor: Rotary Club of Westport, Connecticut, USA

Total budget: \$70,725

Background: Dengue fever is the fastest-spreading tropical disease and a pandemic threat, according to the World Health Organization. An estimated 70 percent of cases occur in Asia.

Scope: The project aimed to interrupt the life cycle of the mosquito that carries dengue in parts of Surakarta by eliminating a common breeding site. The sponsors tiled the cement bathtubs that are common in Indonesian homes with white ceramic tiles, which make mosquito larvae more visible, and trained residents to check for the larvae and to empty, scrub, and cover their tubs to prevent infestation. Community social workers followed up weekly.

Impact: The Rotarians tiled 3,500 tubs. The government is now interested in taking up the project.

Fun fact: This project has been supported by three global grants, including the first one to be approved under The Rotary Foundation's new grant system. The host club's members are all women.

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

7. Supporting the Environment



Insert OF-3: 2020 Facts

SUMMARY STATISTICS

Contribution summary	2019-20 unaudited	Cumulative
Annual Fund	\$123.6 million	\$2.9 billion
Endowment Fund	\$39.3 million	\$414.3 million
PolioPlus Fund	\$132.9 million	\$1.8 billion
Other*	\$43.0 million	\$278.3 million
Total outright contributions	\$338.8 million	\$5.4 billion
Total new commitments to the Endowment Fund	\$52.8 million	\$838.3 million
Polio transfers**	\$17.0 million	–
Grand total	\$408.6 million	–
Program awards & operations	\$327.7 million	Since 1947: \$4.9 billion

* Includes cash contributions to global grants, directed gifts, and the Disaster Response and donor advised funds

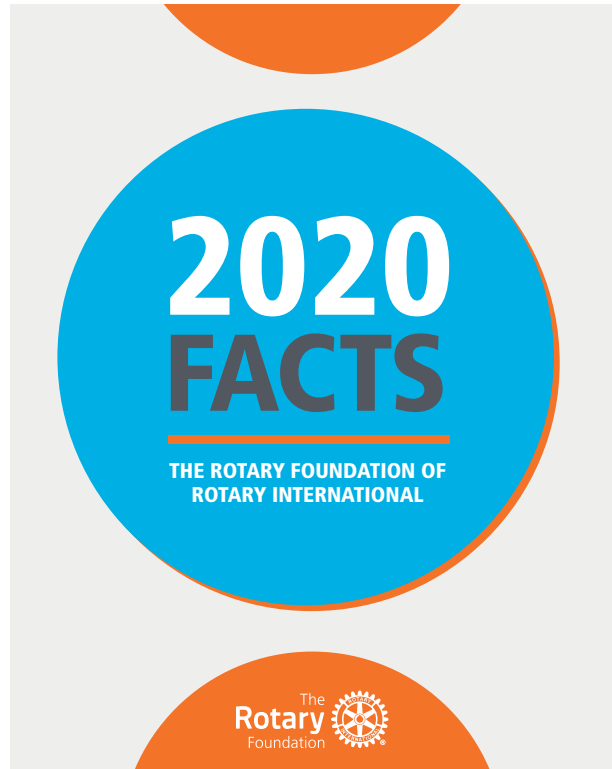
** District Designated Fund transfers and the resulting World Fund match to PolioPlus, affinity card royalties, and donor advised fund transfers to PolioPlus

For additional information, contact:

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One Rotary Center
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60201-3698 USA
Phone: +1-847-866-3000; Fax: +1-847-328-4101
rotarysupportcenter@rotary.org
Rotary.org



159-EN—(11/20)



PROGRAMS

(All figures are as of 30 June 2020 and in U.S. dollars.)

PolioPlus

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

Rotary Peace Centers

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

District grants

District grants support small-scale, short-term projects related to the Foundation's mission. **In 2019-20, the Foundation approved 490 district grants, and program awards totaled \$33.6 million.**

Global grants

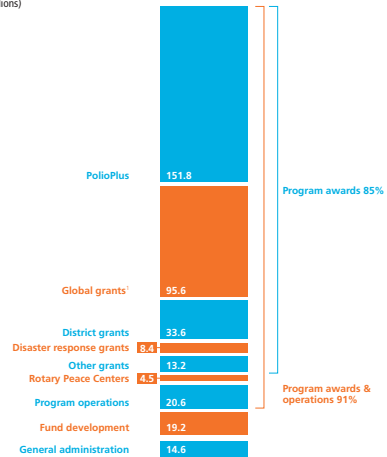
Global grants fund large-scale international activities with sustainable, measurable results that support Rotary's areas of focus. Activities include humanitarian projects, scholarships, and vocational training teams. **In 2019-20, the Foundation approved 1,359 global grants, and program awards totaled \$95.6 million.**

Disaster response grants

Rotary's disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months. **In 2019-20, the Foundation approved 339 disaster response grants, and program awards totaled \$8.4 million.**

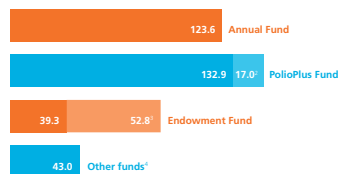
2019-20 TOTAL EXPENDITURES: \$362 million

(in millions)



2019-20 TOTAL CONTRIBUTIONS: \$408.6 million

(in millions)



¹ Net of returned funds and other adjustments
² Polio transfers
³ Total new commitments to the Endowment Fund
⁴ Includes cash contributions to global grants, the Disaster Response and donor advised funds, and directed gifts

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.

Charity Navigator - Rating for :

The Rotary Foundation of Rotary International

Enabling Rotarians to advance world understanding, goodwill, and peace

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

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

Insert OF-5: Donor Recognitions

DONOR RECOGNITIONS

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

Individual recognition

Rotary Foundation Sustaining Member

When you give \$100 or more per year to the Annual Fund.

Benefactor

When you include the [Endowment Fund](#) as a beneficiary of \$1,000 or more in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.

Paul Harris Fellow

When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. Learn more about [Paul Harris Fellow recognition](#).

Multiple Paul Harris Fellow

When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

Paul Harris Society member

When you elect to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant. Learn more about the [Paul Harris Society](#).

Bequest Society

When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.

- \$10,000: Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000: Rotary's Promise crystal and named endowed fund, plus all of the above
- \$50,000: Separate named endowed funds directed to two areas of focus or districts, plus all of the above
- \$100,000: Customized Rotary's Promise crystal, plus all of the above
- \$250,000: Posthumous induction into the Arch Klumph Society, plus all of the above
- \$500,000: Special seating and registration benefits at the Rotary International Convention, plus all of the above

Major Donor

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

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

Arch Klumph Society

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

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

Legacy Society

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

Club recognition

100% Paul Harris Fellow Club

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

100% Paul Harris Society Club

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

100% Foundation Giving Club

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

100% Rotary's Promise Club

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

Every Rotarian, Every Year Club

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

Top Three Per Capita in Annual Fund Giving

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

Naming opportunities

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

Endowed global grant fund

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

Named endowment

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

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

Directed gift global grants

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

Rotary Peace Centers endowment opportunities

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

Rotary Peace Centers directed gifts

- \$75,000: Provides funding for a Rotary Peace Fellow to complete a two-year master's degree program

- \$75,000: Provides funding for up to 10 internships or research projects for peace fellows
- \$60,000: Provides funding for five fellows enrolled in the three-month professional development certificate program
- \$10,000: Provides general support

Rotary Peace Symposium directed gifts

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

Entrepreneurial named gift for peace

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

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

There are four ways to enroll in Rotary Direct:

- Online:** my.rotary.org/en/rotary-direct
By mail: Rotary Direct, 17th Floor, Annual Giving
 One Rotary Center
 1560 Sherman Avenue
 Evanston, IL 60201-3698 USA
By phone: +1-866-976-8279
By fax: +1-847-328-5260

Manage your recurring giving at any time by signing in to My Rotary and going to Donor Self-Service.

YES! I INTEND TO GIVE US\$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: By checking this box, donors notify The Rotary Foundation of their intention to contribute US\$1,000 or more every Rotary year to the Annual Fund or PolioPlus Fund. Learn more at rotary.org/jphs.*

GIFT DESIGNATION (choose one)

- | | | |
|--|--|--|
| <input type="checkbox"/> Annual Fund — SHARE | <input type="checkbox"/> Eradicating polio | <input type="checkbox"/> Promoting peace |
| <input type="checkbox"/> Fighting disease | <input type="checkbox"/> Providing clean water | <input type="checkbox"/> Supporting education |
| <input type="checkbox"/> Saving mothers and children | <input type="checkbox"/> Growing local economies | <input type="checkbox"/> Responding to disasters |

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 / CVN

Signature _____



Your privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data you share with Rotary will only be used for official Rotary business, such as for Rotary fundraising purposes, financial processing, donor recognition, and record keeping. Personal data collected with this contribution is subject to Rotary's Privacy Policy found at rotary.org/privacy.

Engaging Members



I make my club and Rotary stronger by my active participation

<p>Session Goals</p> <p>Explore the value and options of engaging our members.</p>	<p>Materials</p> <ul style="list-style-type: none"> ◆ <input type="checkbox"/> EM-1: Sample Membership Satisfaction Survey (RI) ● Expanded Membership Satisfaction Survey: http://my.rotary.org/en/document/enhancing-club-experience-member-satisfaction-survey ◆ <input type="checkbox"/> EM-2: Engagement Ideas: Delivering Value - Keeping Rotarians ◆ <input type="checkbox"/> EM-3: 12 Point Plan for Membership Engagement ● <input type="checkbox"/> Creating Your Membership Development Plan https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan ● <input type="checkbox"/> Club Assessment Tools https://my.rotary.org/en/document/membership-assessment-tools ● <input type="checkbox"/> 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
<p>Key: ◆ attached insert ● online <input type="checkbox"/> article</p>	

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 meetings. 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 ● □ Tips to a Successful Project https://www.rotary.org/en/tips-successful-rotary-project ● □ Community Assessment Tools. <i>605C-EN (1006)</i> https://my-cms.rotary.org/en/document/community-assessment-tools ● □ The Rotary Foundation’s 7 Areas of Focus 965-EN https://www.rotary.org/en/our-causes ● □ Lead Your Club Service Projects Committee #2260 https://my-cms.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?