



**A Joint Project of over 400 Rotary Districts worldwide**

***2021-22***

# **PARTICIPANT—PART III**

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

**The RLI Recommended Curriculum.** RLI recommends a curriculum and provides outlines and faculty materials to all its divisions. The curriculum has been continually revised and upgraded over the years. Because of the growth of RLI, it is expected that major revisions will be recommended every four years in order to give divisions a sufficient opportunity to orient their faculty members and to provide translations where necessary. Important changes in Rotary are provided annually to all divisions. All curriculum materials and available translations are posted on the RLI materials 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.**

2021-2022 RLI Curriculum Committee

# RLI Part III – MY ROTARY JOURNEY

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

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

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

### COURSE MATERIALS

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



#### **Strategic Planning**

**4**

I can strengthen my club by promoting and leading insightful planning and analysis. Looking at my Rotary club, how can I help make improvements that will matter?



#### **Foundation III: International Service**

**17**

As I further my Rotary journey, I can build connections around the world, helping meet needs, solve problems, and build peace.



#### **Public Image & Public Relations**

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



#### **Building A Stronger Club**

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A new (and old) look at business related activities in your club.



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

Course Evaluation

Handout

## PARTICIPANT GUIDE

# Strategic Planning



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

### **Session Goals**

Understand the Value and Process for Strategic Planning

Analyze Your Rotary Club

Review Possible Areas of Improvement

Discuss How Specific Improvements Should be Made

### **Materials**

◆  SPA-1: Strategic Planning Guide.

◆  SPA-2: Rotary Club Self-Evaluation of Performance & Operations

●  Rotary Club Central  
<https://www.rotary.org/myrotary/en/secure/13301>

Key:     ◆ attached insert     ● online      article

*All session materials are also available at [www.rlifiles.com](http://www.rlifiles.com)*

### **Session Topics**

1. Rotary International suggests that clubs develop strategic plans. What is a strategic plan? Why do we need one? What are the benefits?
2. Based on your previous group Self-Evaluation result “areas of improvement”, develop at least two three-year goals and an annual goal for each one. What strategy are you going to use to accomplish each goal? How can you insure accountability?
3. What is the process of creating a strategic plan? Is board, club, or key member “buy-in” more important? How often does the plan need to be reviewed? Can the plan be changed? How?

4. What is your Rotary club’s “brand” or “distinctive position” in your community? Is it different than the “brand” of Rotary International? Is defining your club’s “brand” important for strategic planning? How do you define your club’s brand?
5. Rotary International has an International Strategic Plan. Let’s review the main points of the Plan.
  - a. What is the Rotary District’s Strategic Plan?
  - b. Does your Club has a Strategic Plan?
6. Why is analysis by a Rotary club important for the club? Why is it an important exercise for the Rotarians within the club?

*"Action without vision is wasted, and vision without action is just a dream.*

7. Complete the survey as directed.

*Action with vision brings hope to the world."*

1996-97 RI Pres. Luis Vicente Giay  
— Address to 1996 Rotary Convention,  
Calgary, Alberta, Canada

8. What was your reaction to the survey?
9. After performing the Self-Evaluation, what areas of improvement are apparent? Are these improvements specific to your club, or do they have a wider application to other Rotary clubs?

# Insert SPA-1 (3 pages)

## Strategic Planning Guide

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

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

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

## Strategic Planning Worksheet

### 1. Where are you now?

List the opportunities and challenges facing your community.

When checking your club’s current state, use Rotary Club Central, Rotary Club Health Check, Membership Assessment Tools, and your region’s version of Be A Vibrant Club to see what your club is doing well and what it could improve.

<b>Club strengths</b>	<b>Club weaknesses</b>
<b>Opportunities for membership development in the community</b> ( <i>new businesses, growing population</i> )	<b>Challenges facing the community</b> ( <i>such as economic decline, competing services</i> )

**2. Where do you want to be?**

List five to 10 characteristics that you would like your club to have three to five years from now.

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community — e.g., “Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)

**3. How do you get there?**

- Set strategic priorities that will help your club achieve its vision, considering:
  - The club’s strengths and weaknesses
  - The goals of the R.I. Strategic Plan, those of your district, and those of your regional membership
  - Programs and missions of Rotary International and The Rotary Foundation
  - Your community’s opportunities and challenges
  - Members’ opinions
  - Achievability in three to five years
- Get the team to choose the most important strategic priorities — those that will have the biggest impact as your club works toward its vision.
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.
- Use Rotary Club Central to help set goals and track achievements.

**Strategic priority 1:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

**Strategic priority 2:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

**Strategic priority 3:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

**4. How are you doing?**

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan, and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.

List steps that your club should take to track its strategic plan, including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.

# Insert SPA-2 (8 pages)

## Rotary Club Self-Evaluation of Performance and Operations

This form is to conduct a self-evaluation and review of your club’s current performance and operations. It is NOT intended to “grade” your club, but rather provide a mechanism to discover the strengths of your club and identify areas that might be improved. Many questions will require a degree of reasonable appraisal. Please be guided by the Four Way Test and your best judgment in answering the questions. Divisions and districts are free to adopt and utilize the evaluation.

### Club Administration

Score

*Please rate the following: Yes= 5 pts No=0 pts Don’t Know = DK*

- 1. Our Rotary Club has adopted the Club Leadership Plan. \_\_\_\_\_
- 2. The club has written By-laws that are available to each member. \_\_\_\_\_
- 3. The club Board of Directors meets on a regularly announced basis. \_\_\_\_\_
- 4. The club has developed both a long-term and short-term plan of action. \_\_\_\_\_
- 5. The club has an e-mail address and/or web page with current information on it. \_\_\_\_\_
- 6. The official Rotary International Directory is available to the members. \_\_\_\_\_
- 7. The club publishes a roster listing the officers, members, committees and chairs. \_\_\_\_\_
- 8. The club plans social events for members and partners throughout the year. \_\_\_\_\_
- 9. The club makes an effort to contact absent or ill Rotarians \_\_\_\_\_
- 10. The club has received a Presidential Citation within the last 3 years. \_\_\_\_\_
- 11. The club has an annually prepared budget that is approved by the members. \_\_\_\_\_
- 12. The club receives a financial report of all income and expenses at least once a year. \_\_\_\_\_

*Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don’t know= DK*

- 13. The club meeting location site or area is \_\_\_\_\_
- 14. The food provided during the meal at the club meeting is \_\_\_\_\_
- 15. The quality of speakers and club programs is normally \_\_\_\_\_
- 16. The meetings start and finish on time and the use of an agenda is \_\_\_\_\_
- 17. The Board of Directors report to the club about their actions is \_\_\_\_\_
- 18. The club’s communication of important Rotary information to the members is \_\_\_\_\_
- 19. The payment of club dues by the members in a timely fashion is \_\_\_\_\_
- 20. The payment of district and International dues in a timely fashion is \_\_\_\_\_
- 21. The information and content of the club newsletter/bulletin is \_\_\_\_\_
- 22. The club’s use of sound systems, lecterns, decorations, flags, banners and other Rotary related items is \_\_\_\_\_
- 23. The operation of the club committee system with regards to meeting regularly and reporting to the board of directors and/or the membership is \_\_\_\_\_
- 24. The club’s promotion of district assemblies, conferences, conventions and special meetings is \_\_\_\_\_

**Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don't know= DK**

- 25. The club's use of RI Themes and knowledge of the RI President's message and initiatives are . . . \_\_\_\_\_
- 26. The club's greeting and treatment of visiting Rotarians is . . . . . \_\_\_\_\_
- 27. The special recognition given to visiting guests during club meetings is . . . . . \_\_\_\_\_
- 28. The information and topics presented at a club assembly is . . . . . \_\_\_\_\_
- 29. The club's treatment and reception of the District Governor's official visit is . . . . . \_\_\_\_\_
- 30. Fellowship encouraged by the use of singing, "happy dollars," raffles, etc. is . . . . . \_\_\_\_\_
- 31. The degree of Rotary spirit and friendly fellowship that exists in the club is . . . . . \_\_\_\_\_
- 32. The club's efforts to recognize special individuals with "Rotarian of the Year",  
"Citizen of the Year", etc. is . . . . . \_\_\_\_\_
- 33. The desire of the Rotarians to sit at a different table each week is . . . . . \_\_\_\_\_
- 34. The club's recognition of special events, birthdays etc of the members is . . . . . \_\_\_\_\_

**Please assign points for the following:**

- 35. Our club has a speaker **weekly** (5 pts), **monthly** (3 pts), **never** (0 pts). . . . . \_\_\_\_\_
- 36. The club newsletter is published **weekly** (5), **bi-weekly** (3), **monthly** (1), **none** (0) . . . . . \_\_\_\_\_
- 37. The club holds regular club assemblies **monthly** (5), **quarterly** (3), **semi-annually** (1),  
**never** (0). . . . . \_\_\_\_\_
- 38. The Rotary International rules on attendance are strictly enforced **always** (5), **usually** (4),  
**occasionally** (3), **seldom** (2), **never** (1) . . . . . \_\_\_\_\_
- 39. The club members are reminded to make-up for absences **always** (5), **usually** (4),  
**occasionally** (3), **seldom** (2), **never** (0) . . . . . \_\_\_\_\_
- 40. The club gives special recognition to individuals who have perfect attendance  
**regularly** (5), **occasionally** (3), **once in a while** (1), **never** (0) . . . . . \_\_\_\_\_
- 41. My club has sponsored a District Governor candidate within the last **1-5 yrs** (5),  
**6-10 yrs** (4), **11-15 yrs**, (3), **16+ yrs** (0), don't know (DK). . . . . \_\_\_\_\_
- 42. My club has provided an Assistant Governor (AG's) candidate within the last  
**1-5 yrs** (5), **6-10 yrs** (3), **never** (0), don't know (DK). . . . . \_\_\_\_\_
- 43. The following number of *Rotarians* from my club attended the last Rotary International  
Convention- **5+** (5), **3-4** (4), **1-2** (2), **zero** (0), don't know (DK). . . . . \_\_\_\_\_
- 44. The following number of *Rotarians* from my club has attended the most recent  
district conference- **10 +** (5), **5-9** (4), **2-4** (3), **1** (2), **none** (0). . . . . \_\_\_\_\_
- 45. The following number of *club leaders* attended the most recent district assembly:  
**5+** (5), **2-4** (3), **1** (1), **none** (0), don't know (DK). . . . . \_\_\_\_\_
- 46. Generally **10 or more** (5), **5-9** (3), **1-4** (1), **no** (0), *Rotarians* from my club attends special  
functions (i.e. dinners, seminars, service events, celebrations, etc) sponsored by the district. . . . . \_\_\_\_\_
- 47. The current president-elect **always** (5), **sometimes** (3), **seldom** (1), **never** (0) attends  
PETS (president-elect training seminar). . . . . \_\_\_\_\_

**Please add the totals points for questions 1-47**

**Club Administration** \_\_\_\_\_

**Don't knows** \_\_\_\_\_

# Membership

Score \_\_\_\_\_

*Please assign points for the following:*

1. The average monthly club attendance figure is **90-100%** (5 pts), **80-89%** (4 pts), **70-79%** (3 pts), **60-69%** (2 pts), **50-59%** (1 pt), don't know (DK) . . . . . \_\_\_\_\_
2. The average age of the club membership is **35-40** (5), **41-50** (4), **51-60** (3), **61-70** (2), **71+** (1), don't know (DK). . . . . \_\_\_\_\_
3. Last year, the club's membership **increased** (5), **remained the same** (3), **decreased** (0), don't know (DK). . . . . \_\_\_\_\_
4. This year the club membership is likely to **increase** (5), **remain the same** (3), **decrease** (0), don't know (DK).. . . . . \_\_\_\_\_
5. The club has sponsored a new club within the **last 1-3 yrs** (5), **4-8 yrs** (4), **9-12 yrs** (2), **longer or never** (0), don't know (DK). . . . . \_\_\_\_\_
6. When a member relocates to another community, the club **always** (5), **sometimes** (3), **never** (0) notifies the nearest Rotary club of the move. . . . . \_\_\_\_\_
7. New members are **always** (5), **sometimes** (3), **never** (0) encouraged to become active in the club . . . . . \_\_\_\_\_
8. The club **frequently** (5), **often** (4), **seldom** (2), **never** (0) holds special membership drives (cocktail, wine & cheese parties, meet & greet, etc) to identify and attract potential new members. . . . . \_\_\_\_\_
9. The club **always** (5), **sometimes** ( 3), **seldom** (1), **never** (0) has information or materials about joining Rotary at its fund raisers or events. . . . . \_\_\_\_\_

*Please rate the following: Yes= 5, No= 0, Don't know= DK*

10. The club has an active membership chair that makes regular reports to the club. . . . . \_\_\_\_\_
11. The club has and uses a membership classification system. . . . . \_\_\_\_\_
12. The club has developed a membership interest survey form. . . . . \_\_\_\_\_
13. The club assigns new members to committees based on their interests. . . . . \_\_\_\_\_
14. The club annually sets measurable and reasonable membership goals. . . . . \_\_\_\_\_
15. The club has and uses a "Mentoring" program. . . . . \_\_\_\_\_
16. The club has developed a welcoming package for new Rotarians. . . . . \_\_\_\_\_
17. The club has a special program (red badge, greeter, etc.) to make new members feel welcome. . . . . \_\_\_\_\_
18. The club conducts new member orientation meetings. . . . . \_\_\_\_\_
19. The club pays for new Rotarians to attend the Rotary Leadership Institute. . . . . \_\_\_\_\_
20. The club conducts an "exit interview" to determine why members leave. . . . . \_\_\_\_\_
21. The club systematically asks each new member for a referral. . . . . \_\_\_\_\_
22. The club provides non-Rotarian speakers with information about Rotary. . . . . \_\_\_\_\_

**Rate the following: Excellent=5, Good=4, Satisfactory= 3, Fair=2, Poor=1, Don't know= DK**

- 23. The club's promotion of membership issues is ..... \_\_\_\_\_
- 24. The club's use of the classification list is ..... \_\_\_\_\_
- 25. The club membership balance and representation of the community business segments and general population are. .... \_\_\_\_\_
- 26. The club's attempts to invite qualified members of any race, gender or ethnic group to join the club is ..... \_\_\_\_\_
- 27. The club's new member orientation meetings are. .... \_\_\_\_\_
- 28. The club's induction ceremony of a new member to the club is. .... \_\_\_\_\_
- 29. The club's "mentoring" program is ..... \_\_\_\_\_
- 30. The club has a specific retention program that is ..... \_\_\_\_\_
- 31. The club's participation at district membership seminars is ..... \_\_\_\_\_
- 32. The effort to encourage all members to attend the Rotary Leadership Institute is ..... \_\_\_\_\_
- 33. Overall, the club's efforts to attract and keep new members is. .... \_\_\_\_\_

**Please add the total points for questions 1-33 Membership** \_\_\_\_\_  
**Don't knows** \_\_\_\_\_

**The Rotary Foundation**

**Score**

**Please rate the following: Yes = 5 No = 0 , Don't know = DK**

- 1. The club has an active Foundation chair that makes regular reports to the members. .... \_\_\_\_\_
- 2. The club sets and achieves its Foundation giving goal each year. .... \_\_\_\_\_
- 3. The club encourages individuals to become Paul Harris Fellows on their own. .... \_\_\_\_\_
- 4. The club matches contributions made by members to the Rotary Foundation. .... \_\_\_\_\_
- 5. The club makes a special presentation of a new Paul Harris Fellowship ..... \_\_\_\_\_
- 6. The club publicly posts a list of all the Paul Harris Fellows. .... \_\_\_\_\_

**Please assign points for the following:**

- 7. **Most** (5 pts), **many** (4 pts) **some** (3 pts) **few** (2 pts) **none** (0 pts) of the club members understand that money given to The Rotary Foundation returns to the district for its use three years later ..... \_\_\_\_\_
- 8. Information about The Rotary Foundation is provided to the club every **month** (5), **three months** (3), **six months** (1) **never** (0). .... \_\_\_\_\_
- 9. **All** ( 5), **most** (4), **many** (3), **some** (2), **few** (1), **none** (0) of the club members know about Paul Harris Fellows and how to become one. .... \_\_\_\_\_
- 10. **Most** (5), **many** (4), **some** (3), **few** (2), **none** (0) of the club members contribute each year to The Rotary Foundation under the Every Rotarian Every Year program. (EREY). .... \_\_\_\_\_
- 11. My club has sponsored a GSE or VTT team member, a global scholar or a peace scholar **within the last 1-3 yrs** (5), **4-6 yrs** (3), **longer or never** (0), don't know (DK). .... \_\_\_\_\_

12. My club has hosted a visiting GSE or VTT team **within the last 1-5 yrs (5), 6-8 yrs (3), longer or never (0)**, don't know (DK). . . . . \_\_\_\_\_
  13. My club has applied for a Global Grant with an international partner **within the last 1-3 yrs (5), 4-6 yrs (3), longer or never (0)**, don't know (DK). . . . . \_\_\_\_\_
  14. My club has applied for a District Grant **within the last 1 yr (5), 2-3 yrs (3), longer or never (0)**, don't know (DK) . . . . . \_\_\_\_\_
  15. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Fellows . . . . . \_\_\_\_\_
  16. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Sustaining Members . . . . . \_\_\_\_\_
  17. **Most (5pts), many (4), some (3), few (2), none (0)** of club members are bequest donors to The Rotary Foundation. . . . . \_\_\_\_\_
  18. **Most (5), many (4), some (3), few (2), none (0)** club members are benefactors to The Rotary Foundation . . . . . \_\_\_\_\_
  19. **Most (5), many (4), some (3), few (2) none (0)** of club members are Paul Harris Society members. . . . . \_\_\_\_\_
  20. **Most (5), many (4), some (3), few (2), none (0)** of club members are Major Donors to The Rotary Foundation. . . . . \_\_\_\_\_
  21. **Most (5), many (4), some (3), few (2), none (0)** of club's existing Paul Harris Fellows make subsequent contributions to The Rotary Foundation . . . . . \_\_\_\_\_
- Please add the total points for questions 1-22 Foundation** \_\_\_\_\_
- Don't knows** \_\_\_\_\_

## Service Projects

Score . . . . .

*Rate the following: Excellent=5, Good= 4, Satisfactory= 3, Fair= 2, Poor=1, Don't know= DK*

1. The club's attempts to promote vocational service are . . . . . \_\_\_\_\_
2. The promotion of the 4-Way Test in the club and community is . . . . . \_\_\_\_\_
3. The use of career development programs by the club in local schools to help students with career choices is. . . . . \_\_\_\_\_
4. The club's effort to promote high ethical standards, professional dignity or service performance in the club and community is . . . . . \_\_\_\_\_
5. The club's effort to conduct one new community service project each year is . . . . . \_\_\_\_\_
6. The club's effort to conduct one new international service project each year is . . . . . \_\_\_\_\_
7. The club's use of input, talents and resources of the members for service projects is . . . . . \_\_\_\_\_
8. The club's use of input, talent and resources from community leaders for service is . . . . . \_\_\_\_\_
9. I consider the club's activities regarding service, locally and internationally, to be . . . . . \_\_\_\_\_

10. Please add 3 pts for each service project that your club has done *within the last 3 years*

The club has conducted an active program or project in the following areas:

- Drug use prevention or rehabilitation .....
- Polio eradication or other community immunization project .....
- Environmental activities.....
- Literacy projects.....
- Clean water programs .....
- Providing food for the hungry .....
- Assisting the community’s handicapped or elderly .....
- Providing health or medical care locally or Internationally.....
- Providing recreational opportunities for the community.....
- Helping the poor or needy of the community .....
- Improving the community’s economic or social quality of life.....
- Conducting career opportunity programs.....
- Assisting or guiding the youth of the community .....
- Creating or supporting a Rotaract or Interact Club .....
- Working with other local service groups on a common project.....
- Work with other Rotary Clubs on a common project.....
- Work with community educational facilities .....
- Traffic or highway safety programs or projects .....
- Animal safety or care programs .....
- Disaster assistance program or project.....
- Others .....

Total points for question 10.....

**Please rate the following: Yes = 5 No= 0, Don’t know= DK**

11. The club conducts various fund raisers to support its service programs.....
12. The club relies mainly on financial contributions from the members to fund its service programs.....
13. The club has participated in an International Service project within the last 2 years.....
14. The club participates actively in the Youth Exchange Program.....
15. The club regularly invites the local Youth Exchange students to its meetings.....
16. Club Rotarians normally act as the host parents for the visiting Youth Exchange .....
17. The club is aware of and planning to institute or cooperate with the mandated “Background Checks” for the Youth Exchange program.....
18. The club annually recognizes at least one outstanding student or student leader .....
19. The club sponsors at least 1 World Community Service project a year.....
20. The club participates in or recognizes the Rotary UN day at the United Nations headquarters. .
21. The club has participated within the last 3 years in a Rotary Friendship Exchange.....

- 22. Within the last 3 years, the club has participated in a Twin Cities, Sister Club, or Matched Club program with 1 or more Rotary clubs around the world. \_\_\_\_\_
- 23. The club, within the last 3 years has sponsored at least one student with a Rotary Youth Leadership Award (RYLA). \_\_\_\_\_

**Please add the total points for questions 1-23**

**Service Projects** \_\_\_\_\_

**Don't knows** \_\_\_\_\_

**Rotary Publicity & Public Relations**

**Score**

- 1. Our club **always** (5), **often** (3), **seldom** (1) **never** (0) has articles or pictures of our activities in the local media. \_\_\_\_\_
- 2. Our club **always** (5), **often** (3), **seldom** (1), **never** (0) uses the Public Access channels to promote or publicize our activities. \_\_\_\_\_
- 3. The members of the club **always** (5), **often** (4), **seldom** (1), **never** (0) wear their Rotary pins. \_\_\_\_\_
- 4. Our club has **many** (5), **some** (3), **one** (1) **no** (0) road signs at the entrances to the community announcing the day, time and location of our meeting. \_\_\_\_\_
- 5. When the club provides financial support to other organizations, it **always** (5), **often** (4), **seldom** (1), **never** (0) asks the other organization to publicize the donation in the local media. \_\_\_\_\_

*Please rate the following: Yes= 5pts No= 0 pts Don't know=DK*

- 6. Our club has a visible sign that "Rotary Meets Here" at our meeting site. \_\_\_\_\_
- 7. The club has used advertising (billboards, newspapers, community brochures, etc.) within the last 2 years. \_\_\_\_\_
- 8. Local Rotarians have been interviewed about the club on radio or TV within the last year. \_\_\_\_\_
- 9. Representatives from the media are active members of the club. \_\_\_\_\_
- 10. The club has a brochure describing the club and its projects available for handout. \_\_\_\_\_
- 11. The Rotary logo and club identification is visible for completed community service projects. \_\_\_\_\_

**Please add the total points for questions 1-11**

**Rotary Public Relations** \_\_\_\_\_

**Don't knows** \_\_\_\_\_

**Bonus Questions**

**Score**

- 1. I receive the Rotarian magazine each month. (Y=5, N=0) \_\_\_\_\_
- 2. I have received or am familiar with the District Governor's newsletter. (Y=5 N=0) \_\_\_\_\_
- 3. I have brought in a new member to the club within the last 2 years. (Y=5 N=0) \_\_\_\_\_
- 4. I understand the SHARE System of The Rotary Foundation. (Y=5, N=0) \_\_\_\_\_
- 5. I am a Paul Harris Fellow or a Sustaining Member. (Y=5, N=) \_\_\_\_\_
- 6. I have worked on or contributed to a service project within the last 2 years. (Y=5 N=0) \_\_\_\_\_
- 7. I visit the club, district or Rotary International web sites **daily** (5), **weekly** (4), **monthly** (3), **occasionally** (2), **never** (0) \_\_\_\_\_

- 8. I **always** (5), **sometimes** (3), **never** (0 pts) make-up for a missed meeting..... \_\_\_\_\_
- 9. I have personally served on a district committee within the last **1-5 yrs** (5), **6-10 yrs** (3), **longer or never** (0)..... \_\_\_\_\_
- 10. I have attended the district conference or International convention within **the last year** (5), **2-5 yrs** (3), **longer than 5 yrs** ( 1), **never** (0). .... \_\_\_\_\_
- 11. I have contributed to The Rotary Foundation within the last **1 year** (5), **2-3 years** (3), **4 years or more** (1), **never** (0)..... \_\_\_\_\_

Please add the total points for questions 1-11 Bonus Questions \_\_\_\_\_

**Totals**

<b>Total Club Administration</b> (from page 7)	_____	out of 235 points	<b>DKs</b>	_____ (38)
<b>Total Membership</b> (from page 9)	_____	out of 165 points	<b>DKs</b>	_____ (29)
<b>Total Foundation</b> (from page 10)	_____	out of 110 points	<b>DKs</b>	_____ (10)
<b>Total Service Projects</b> (from page 12)	_____	out of 173 points	<b>DKs</b>	_____ (2)
<b>Total Rotary Public Relations</b> (from page 12)	_____	out of 55 points	<b>DKs</b>	_____ (6)
<b>Total Bonus Questions</b> (from page 13)	_____	out of 55 points		
<b>GRAND TOTAL</b>	_____	out of 793 points		

- 700 points plus = Outstanding
- 600–699 points = Excellent
- 500–599 points = Very Good/Average
- 400–499 points = Could be improved
- 300–399 points = Caution—club may need assistance
- less than 300 points = The club is in need of serious and immediate assistance

*Please DO NOT make any adjustments to totals for DKs. The following is for reference only.*

- 1–10 DK’s = 5 to 50 additional points—**Normal**
- 11–20 DK’s = 55 to 100 points—**Caution**, should be concerned about the lack of knowledge about your club.
- 21–35 DK’s = 105 to 175 points—**Critical**, you need to learn more about your club.
- 36 or more = **Unacceptable**—Unless you’re a new member, you need to seriously learn more about the functioning of your club.

***This is a non-weighted, unscientific analysis of your club and the results should only be used to identify areas that either you or the club might be lacking. It should not be taken as a negative reflection on the activities of the club or its Rotarians.***

**A copy of this survey for duplication is available at [www.RLI33.org](http://www.RLI33.org) under the "Downloads" section.**

# Foundation III: International Service



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

## ***Session Goals***

Learn about opportunities for international service

Utilize our vocational skills on international projects

Learn how Rotarian Action Groups broaden our service

Explore ideas for international service

## ***Inserts & Online Materials***

- ◆ **Insert IS-1:** What is an International Service Project?
- ◆ **Insert IS-2:** Bringing It Together in Int'l Service
- □ Communities in Action *605-EN-(112)*  
<https://www.rotary.org/myrotary/en/document/577>
- Rotary Showcase Search  
[http://map.rotary.org/en/project/pages/project\\_showcase.aspx/](http://map.rotary.org/en/project/pages/project_showcase.aspx/)
- □ Rotary Friendship Exchange Handbook (*909*)  
<https://www.rotary.org/myrotary/en/document/146976>
- Guide to Global Grants *1000-EN (1015)*  
<https://my.rotary.org/en/document/guide-global-grants>

Key:    ◆ attached insert    ● online    □ article

*All session materials are also available at [www.rlifiles.com](http://www.rlifiles.com)*

## ***Session Topics***

- 1) What is International Service?
- 2) A Rotarian while traveling internationally visited a club and became interested in helping with a problem in the community she was visiting. After obtaining the local Rotary club's commitment to address that problem, how should the Rotarian (and the local club) proceed to bring the project to fruition?

- 3) International service can be **with** Rotary Foundation support or **without** Rotary Foundation support. Discuss the advantages of each.
  
- 7) How can we utilize our vocational skills in international service?
  
- 8) Global Grant Exercise—The class will engage in the process of creating an international Global Grant project, including the funding flow.

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

### International Service Projects aim to:

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

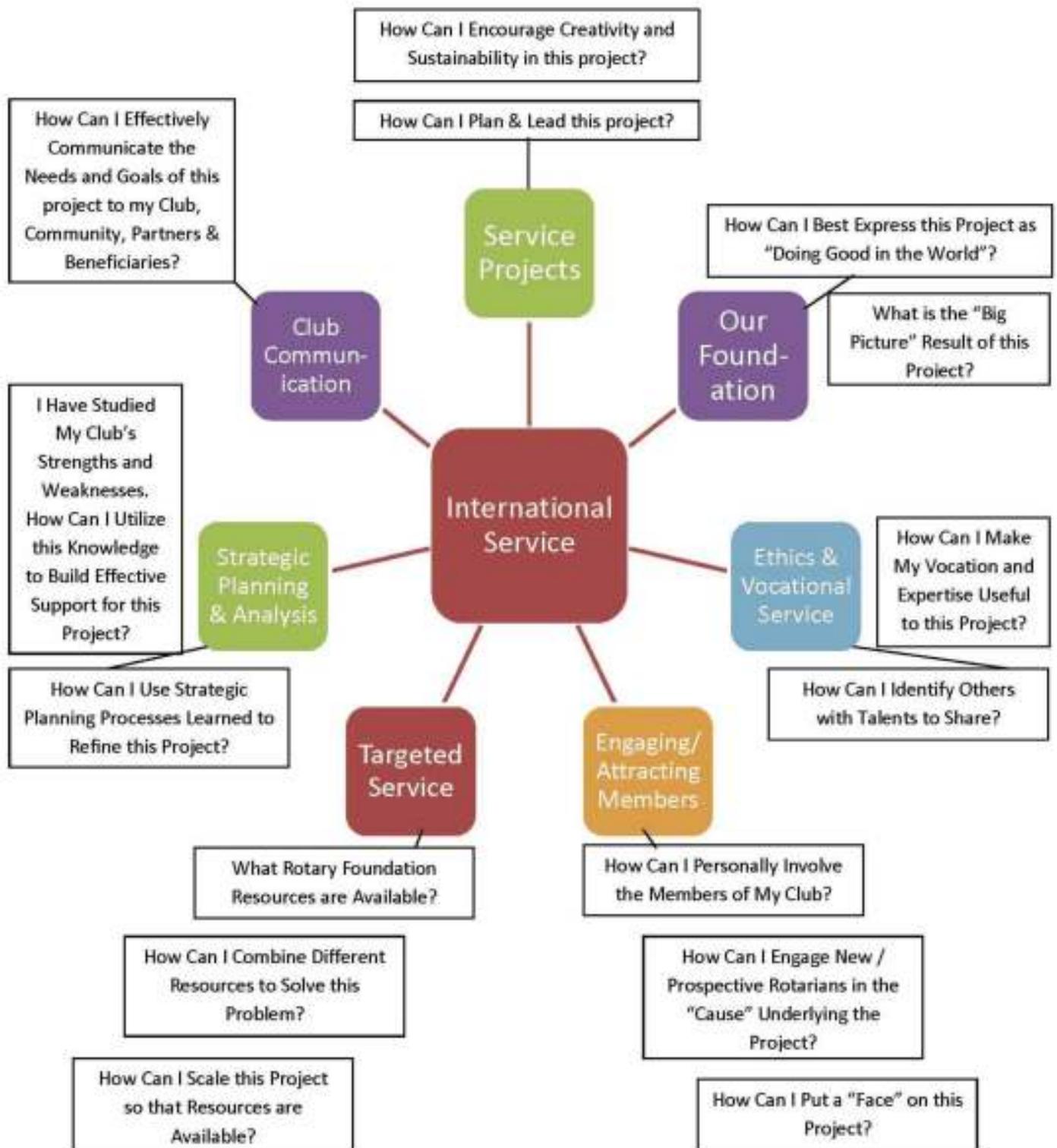
**Global Grant projects** must adhere to specific criteria.  
Visit the Grant Center at [www.rotary.org](http://www.rotary.org).

### Getting Involved

Rotary clubs that get involved find that a project's benefits extend far beyond the communities where their projects take place. Clubs have the opportunity to (1) Undertake more ambitious projects (2) Empower all participants in service efforts (3) Develop closer ties with Rotarians abroad (4) Further international understanding and goodwill AND, (5) Address global concerns

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

## Insert IS-2: Bringing It Together in International Service



# Public Image and Public Relations



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

## Session Goals

Discuss Public Image and Publicity as it relates to Rotary and my members and clubs

Explore how my club can benefit from a Public Relations Strategy

Identify my club's target audience and how we can effectively reach it

## Inserts & Online Materials

- ◆ **Insert PIPR-1:** Public Relations Case Study
- ◆ □ **Insert PIPR-2:** Public Relations Writing
- Visual Identity Guide (Login required)  
<https://www.rotary.org/en/news-features/media-center>
- Rotary Logos (Login required)  
<http://www.Rotary.org/logos>

Key:     ◆ attached insert     ● online     □ article

## Session Topics

- 1) Who is the club's target Audience?
  
- 2) What is the difference between Publicity, Public Relations, and Public Image?  
Which one might we have more control over?



## Insert PIPR-1: Public Relations Case Study

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

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

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

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

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

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

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

## Insert PIPR-2: Public Relations Writing

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

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

**The five Ws.** Include the five Ws in your first paragraph, ideally in the first sentence:

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

In subsequent paragraphs, provide details about the event or project, or describe how the person or group achieved something extraordinary.

**Beyond the press release.** Rotarians can communicate stories to the media in many other ways, such as:

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

*Excerpted from [www.Rotary.org](http://www.Rotary.org)*

# Building A Stronger Club



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

## **Session Goals**

Examine the varying expectations of Rotary

Explore the consequences of met and unmet expectations

Know how I can assist in delivering on Rotary's promise

## **Materials**

◆ ● Insert BSC-1: Guiding Principles of Rotary

◆ □ Insert BSC-2: Expectation & Delivery Exercise

◆ ● Be a Vibrant Club 245-EN (111)

Key: ◆ attached insert    ● online    □ article

## **Things to Think About**

- 1) What is meant by Rotary's promise? Discuss?
  
  
  
  
  
  
  
  
  
  
- 2) What types of specific or general expectations are set, if any, in your club? discuss this issue for one of the groups identified in the prior question and complete the Expectation and Delivery Exercise.
  
  
  
  
  
  
  
  
  
  
- 3) Consider how your club might meet these expectations through each of the five Avenues of Service. What is my role in doing this?

4) Is there a disconnect between what is promised and what is delivered?

5) List three activities that my club can realistically do to meet the expectations of one group that is important for your club.

6) In light of this discussion, how can I make my club stronger?

## Insert BSC-1: Guiding Principles of Rotary

### Guiding principles

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

### Object of Rotary

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

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

### The Four-Way Test

The Four-Way Test is a nonpartisan and nonsectarian ethical guide for Rotarians to use for their personal and professional relationships. The test has been translated into more than 100 languages, and Rotarians recite it at club meetings:

Of the things we think, say or do

Is it the TRUTH?  
Is it FAIR to all concerned?  
Will it build GOODWILL and BETTER FRIENDSHIPS?  
Will it be BENEFICIAL to all concerned?

### Avenues of Service

We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.

- **Club Service** focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.
- **Vocational Service** calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society. Learn more in *An Introduction to Vocational Service and the Code of Conduct*.
- **Community Service** encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest. Learn more in *Communities in Action: A Guide to Effective Projects*.
- **International Service** exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.
- **Youth Service** recognizes the importance of empowering youth and young professionals through leadership development programs such as Rotaract, Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.

## Insert BSC-2: Expectation & Delivery Exercise

Considering one group of the following in relation to your club, complete the table, using specific examples:  
 1. Current members; 2. Potential members; 3. Community; 4. Businesses; 5. Youth; 6. RI Organization; 7. Others?

List specific activities	Avenue of Service	Promise, Do, and Do Well	Promise, Do Poorly (minimal effort)	Promise, Set Expectations, But Don't Do	No Promise, No Expectations, Do	No Promise, No Expectations, Don't Do

# Making a Difference



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

## **Session Goals**

How can I, as an RLI Participant, contribute to improving the RLI experience for others?

How can I use the ideas raised at RLI to improve my Rotary club, other groups in my civic, social or business life?

From your experience, analyze the strengths and weaknesses of the RLI program, and make some specific suggestions for improvement

## **Materials**

- ◆ Insert MD-1: RLI Courses
- ◆ Insert MD-2: My RLI Personal Action Plan

Key:    ◆ attached insert    ● online    □ article

## **Session Topics**

- 1) What RLI Sessions were most memorable to you individually, and why?
  
  
  
  
  
  
  
  
  
  
- 2) Has RLI made a difference in your Rotary club? If not, why, and what can be done to change things so that RLI is making a difference in your club?
  
  
  
  
  
  
  
  
  
  
- 3) What are some of the issues facing Rotary and your club that can be improved through the use of ideas, skills or techniques used in RLI?

4) What can Rotary, and specifically your Rotary club, do better, and can RLI assist?

5) Is RLI making a difference?

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

6) What have you taken away from your RLI experience? What can RLI do better to make a difference for the next person? Could we have done anything differently to have made the experience even better for you?

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

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

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

8) What activities were most effective at getting across the goals of the sessions? Why?

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

*—Past RI Director & RLI Founder  
David Linett*

10) Complete the Personal Action Plan.

**CONGRATULATIONS, GRADUATES!**  
***Want more? RLI has a Graduate program with courses on specific topics just for graduates:  
Visit [www.RotaryLeadershipInstitute.org](http://www.RotaryLeadershipInstitute.org) for more information on current course offerings.***

## Insert MD-1: RLI Undergraduate Courses

	<b>RLI Curriculum</b>
<b>Part I</b>	My Leadership In Rotary My Rotary World Ethics and Vocational Service Foundation I: Our Foundation Engaging Members Creating Service Projects
<b>Part II</b>	Strategic Planning Attracting Members Club Communication Team Building Foundation II: Targeted Service
<b>Part III</b>	Rotary Opportunities Effective Leadership Strategies Foundation III: International Service Public Image & Public Relations Building A Stronger Club Making a Difference

## Insert MD-2: My RLI Personal Action Plan

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

\_\_\_\_\_

SMART Objective: \_\_\_\_\_

S pecific \_\_\_\_\_

M easurable \_\_\_\_\_

A chievable/Agreed to \_\_\_\_\_

R ealistic/Result-oriented \_\_\_\_\_

T ime-framed (goal attainment date) \_\_\_\_\_

Action Steps to take to achieve this goal:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Additional Training or Knowledge I may need: \_\_\_\_\_

\_\_\_\_\_

How I plan to celebrate my success! \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_