

Find Your Passion in Rotary



Lone Star Division RLI

A Joint Project of over 400 Rotary Districts Worldwide

2026-2027 Participant Materials

LSRLI PD Hours: 5.6 or .6 CEU's

PARTICIPANT - PART III



Lone Star Division Rotary
Leadership Institute (RLI)



Greetings RLI Part III Participants – and soon-to-be RLI Graduates!

Welcome Back!

You are about to step through a door of opportunity as you embark on Part III of RLI, which focuses on your Rotary Journey.

RLI has been instrumental in shaping our personal Rotary experiences and broadening our understanding of Rotary beyond our clubs. Through RLI, we have explored the vast world of Rotary, its challenges, and its opportunities, gaining invaluable insights along the way. We are deeply grateful to those who provided us with this opportunity, and we hope you will feel the same sense of gratitude and accomplishment as you complete your own RLI journey.

Upon completing RLI, you will graduate as a stronger, more confident leader. We encourage you to apply what you've learned, both as a recognized leader and as a guiding force within your club and community. Use your vision to identify opportunities for improvement and leverage your leadership skills to inspire and engage others in making those visions a reality. You have the power to make a meaningful difference!

As Dr. Seuss aptly said, "Your mountain is waiting... so get on your way!"
We look forward to seeing you continue your journey and share your passion for Rotary as you navigate "the road ahead".

Best regards,

Debbie G. High
Co-Chair
Lone Star Division RLI

Sherri C Muniz
Co-Chair
Lone Star Division RLI





Lone Star Division RLI

Continuing Education Recognition

LSRLI Courses have been designed as leadership development experiences grounded in facilitated discussion, applied learning, and practical implementation. In recognition of the depth and instructional rigor of these programs, LSRLI Courses may offer Professional Development Hours (PDHs) and/or Continuing Education Units (CEUs).

Credit Designation

- 1 Professional Development Hour (PDH) is awarded for each hour of instructional time.
- 1 Continuing Education Unit (CEU) equals 10 instructional hours.
- Instructional time includes facilitated discussion, structured activities, case studies, and guided reflection. Breaks, meals, and informal networking time are not included.

The number of PDHs or CEUs available for a specific course will be clearly stated in the course description.

Requirements for Receiving Credit

To receive Professional Development Hours or Continuing Education Units for a course, participants must:

- Attend at least 90% of total instructional time
- Engage actively in course discussions and learning activities
- Comply with any attendance verification procedures

Because LSRLI courses rely on interactive adult learning methods, meaningful participation is expected.

Certificate of Completion

Participants who meet the requirements will receive a Certificate of Completion documenting:

- Course title
- Date(s) completed
- Total instructional hours
- PDHs or CEUs awarded

Certificates are issued by the Lone Star Division of the Rotary Leadership Institute.

Important Information

Professional Development Hours and Continuing Education Units issued for LSRLI Courses are intended for leadership and professional development purposes.

Acceptance of these hours is determined by the participant's employer, organization, or certifying body. These credits do not represent state licensure approval or professional board certification.

Participants are encouraged to retain their certificates for their professional records.

How to Use This Workbook

This workbook is your personal guide for RLI Part III. It is designed to help you follow the session, capture important ideas, reflect on your Rotary experience, and identify practical actions you can take back to your club.

Use the workbook actively. Write in it, mark ideas that matter to you, complete the reflection prompts, and use the note spaces to capture questions, insights, and next steps. Some pages are provided simply for your notes because your own thoughts, examples, and commitments are an important part of the learning experience.

As you move through each session, look for three things:

What do I want to remember?

Record key ideas, useful Rotary resources, and comments from other participants that help you think differently.

How does this apply to my club?

Connect each topic to real situations in your Rotary club, committee work, leadership role, or community service.

What will I do next?

Use the reflection and action prompts to identify one practical step you can take after RLI.

RLI works best when everyone participates. Listen, share, ask questions, and learn from the experience of others. You do not need to have all the answers. The goal is to leave with stronger Rotary knowledge, greater confidence, and a clearer sense of how you can serve and lead more effectively.

Please complete the required reflections, worksheets, action steps, and session evaluation materials. These items support your learning and may also be used to document participation for CE/PD credit when applicable.

This workbook was generated with AI assistance

LSRLI Part III – The Journey

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

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

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

COURSE MATERIALS



Planning for Success / Strategic Planning 7

Strengthen your club through insightful strategic planning and leadership.



The Rotary Foundation: International Service 30

Use Rotary Foundation resources to expand your club's international service.



Public Image 45

Identify opportunities to promote your club's image to your community and the world.



Building a Stronger Club..... 58

Compare member expectations with your club's experience to help it deliver on Rotary's promise.



Making a Difference 71

Connect your RLI growth to Rotary's Vision and translate learning into action.

The Rotary Leadership Institute International is not an official training program of Rotary International

Planning for Success / Strategic Planning



Session Purpose

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

Session Goals

- Explain the value and process of strategic planning for Rotary club sustainability.
- Analyze club strengths, challenges, opportunities, and risks.
- Identify strategic priorities for club improvement.
- Develop specific improvement steps using SMART goals, implementation planning, mentoring, and succession thinking.

Core Resources

- Rotary Club Health Check
- Membership Assessment Tools
- Strategic Planning Guide
- Rotary Action Plan
- Strategic Priorities Worksheet
- SWOT Analysis Template
- SMART Goals Worksheet

Resources from either this Part III Workbook or on the website, <https://lonestarrli.org/page/part-iii-participant-workbook-amp-resources-1>

Opening Reflection

Planning for Success asks us to think beyond one meeting, one project, one fundraiser, or one Rotary year.

What happens to a Rotary club when strong leaders leave without preparation?

What happens when a club has activities but no shared direction?

What is one area where my club would benefit from more thoughtful planning?

Planning as Sustainable Leadership

Strategic planning is one way Rotary clubs turn good intentions into sustained action.

A club plan helps members answer:

- Where are we now?
- Where do we want to go?
- Why does it matter?
- What should improve?
- What must continue?
- Who needs to be involved?
- How will we measure progress?
- How will leadership continue beyond one person or one Rotary year?

Sustainable leadership is leadership that outlasts individuals and strengthens institutional capacity.

The RI Strategic Planning Guide gives clubs a practical planning path:

- Determine your status: How is our club doing now?
- Develop a vision: What do we want our club to be like?
- Make a plan: How can we achieve our vision?
- Track progress: How close are we to our goals?

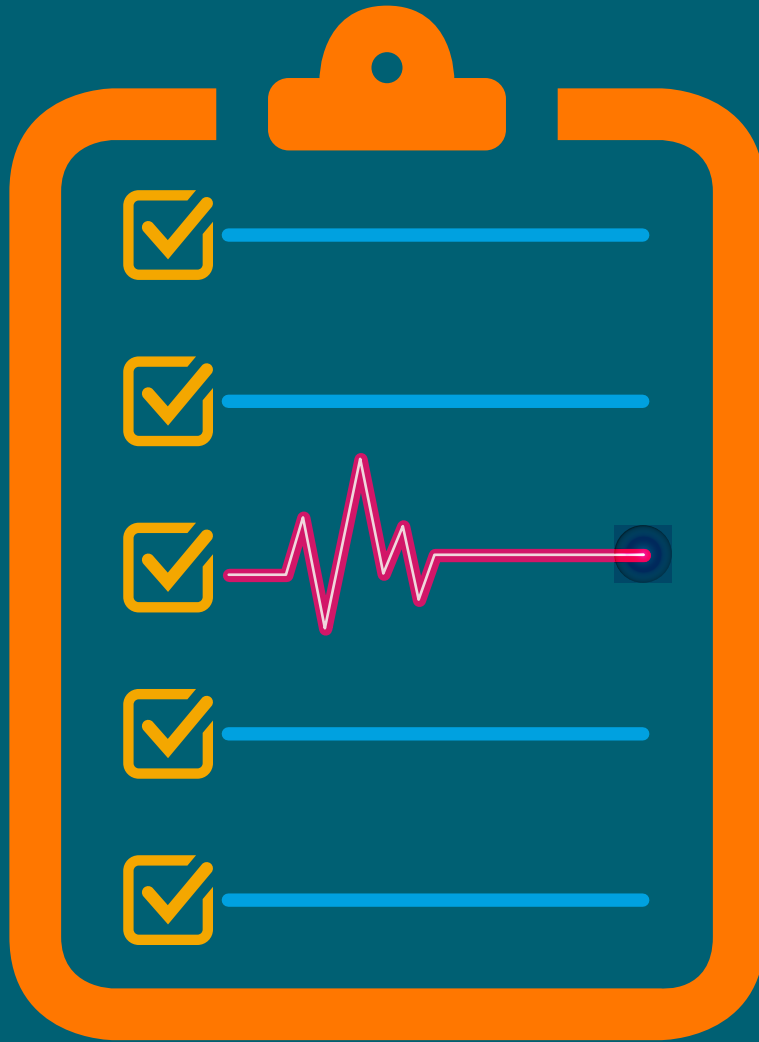
Rotary's Action Plan gives clubs an alignment lens for that planning work:

- Increase our impact
- Expand our reach
- Enhance participant engagement
- Increase our ability to adapt

A strong club plan should connect local club reality with Rotary's broader direction. The goal is not to copy Rotary's Action Plan word-for-word. The goal is to ask whether the club's priorities help it create greater impact, reach more people, engage participants more meaningfully, and adapt to changing needs.

A strong club plan should include:

1. Strategic Vision — a shared picture of where the club is going
2. Mentoring — intentional development of members and future leaders
3. Succession — preparation for leadership continuity and follow-through
4. Action Plan Alignment — a clear connection between club priorities and Rotary's strategic direction



CLUB HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies. This resource is intended to help club leaders assess their clubs. In using it, you're taking a step to maintain your club's health and preserve its value for members and the community. Mark the boxes next to the statements you consider to be true, based on the past 12 months. Then discuss the results with your fellow club officers. If you left more than five of the boxes in any section blank, that area should be addressed. Act on the suggested remedies for any problem areas you've identified.

YOUR CLUB EXPERIENCE



Members who have a positive club experience are more likely to stay. In turn, they create a positive experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- ☐ I look forward to attending club meetings and other club activities.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter or greeters who welcome members and visitors to meetings.
- ☐ Our meetings are organized and are run professionally.
- ☐ Members make an effort to meet and talk with different people at each meeting.
- ☐ I've made several new friends in the club.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.
- ☐ We are inclusive in who we invite to our club, how we welcome guests, the topics we discuss, and the service we focus on.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's Avenues of Service and areas of focus, take part in projects, and feel proud to be a part of the club.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members' service, engagement, and donations by nominating them for and presenting them with awards.
- ☐ I have made international connections through Rotary.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ We provide members with flexible meeting opportunities (attending virtually or in person or watching recordings if they miss a meeting).

COMMENTS

**SEE THE NEXT PAGE FOR YOUR
PROGNOSIS AND REMEDIES**





If members are not having a good experience, your club is at risk of losing them. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	+ Try something new at a meeting. For example, show one of these inspirational speeches and have a discussion afterward. + Hold online meetings when in-person meetings aren't feasible, or allow some members to connect virtually and others to attend in person. + Find a skilled person in the club or district who can facilitate and run online meetings. + Contact your Member and Participant Experience representative for ideas.
Rotary experience beyond the club	+ Sponsor another Rotaract or Rotary club. + Start or get involved in an Interact program. + Connect members to Rotary's various programs. Sponsor an Interact club, organize a RYLA event, create a scholarship, or start an exchange. + Remind members that they can join a Rotary Fellowship or Rotary Action Group. + Promote district events that are open to all members. Have someone who has attended in the past talk about the experience. + Promote the work that Rotary and Rotaract do both globally and locally, including polio eradication. + Work with your local Toastmasters club to build leadership and communication skills among members. + Visit other clubs to connect with new people and see what they're doing that your club could try.
Unmet expectations	+ Find out what experience your members want to get out of your meetings by using the Member Satisfaction Survey, and then give them that experience. + Encourage members to develop leadership skills by taking courses in the Learning Center.

SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons members join and stay involved in Rotary. The healthiest clubs vary their activities and offer a number of ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

- ☐ Our club holds regular get-togethers (in addition to club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, friends, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites members of the Rotary family (such as Interactors, Rotary Youth Exchange students, and Rotary Peace Fellows) to participate in meetings and events.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Rotary Youth Exchange student, is involved with New Generations Service Exchange, or organizes a Rotary Youth Leadership Award (RYLA) event.
- ☐ Our club has direct communication with partners, friends, and alumni.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We participate in project project fairs or consult The Rotary Foundation Cadre of Technical Advisers to look for ideas and partners before we choose a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input, such as their vocational expertise, on service and social activities.
- ☐ Our club service projects align with Rotary's areas of focus.
- ☐ Our club has applied for or used Rotary Foundation grant funds for a service project.
- ☐ At least one member of our club attends a Rotary Foundation grant management seminar each year.
- ☐ Our club contributes to The Rotary Foundation.
- ☐ Our club has a Rotary Foundation committee chair and a service projects committee chair.

COMMENTS



Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	+ Sponsor an Interact club, organize a RYLA event, create a scholarship, start an exchange, join a Rotary Action Group, or support the Rotary Peace Centers. + Let members know about Rotary's exchange programs.
Quality of projects	+ Use Community Assessment Tools and A Guide to Global Grants to improve the quality of your projects. + Connect with your Cadre advisers to get guidance on service projects. + Evaluate your club's service projects to determine if repeating them is worth the effort.
Social activities	+ Put one or two members in charge of organizing socials throughout the year. + Join a Rotary Fellowship. + Find or create a variety of events with different times or formats. + Make sure members have time during meetings to connect and strengthen relationships.
Leadership	+ Help your members develop and practice their leadership skills. Promote the Learning Center's professional development catalog. + Give new and young members leadership roles. + Create clear descriptions of key club positions and outline the expectations for each.

MEMBERS



A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary. Consult your club's membership profile in Rotary Club Central for the most recent statistics.

- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in members who represent diverse groups.
- ☐ Our club represents the racial or ethnic diversity of our community.
- ☐ Our club seeks to attract members from professions in the community that are underrepresented in the club.
- ☐ New members are officially inducted and are given an orientation, informational materials, and opportunities to get involved.
- ☐ Our club actively engages Rotary alumni (former Rotary Youth Exchange students, Rotary Peace Fellows, and participants of other Rotary programs).
- ☐ Our club shows its appreciation of each member's unique contributions.
- ☐ Our club retains at least 90% of its members each year.
- ☐ At least 75% of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ A designated person checks and follows up on membership leads assigned to our club.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.
- ☐ Our club has a membership committee whose chair and members are dedicated to attracting and engaging club members.
- ☐ Members attend district events and seminars on Rotary topics that interest them.

COMMENTS



Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	+ Find new people to invite to your club using this prospective member exercise. + Learn about Rotary's commitment to enhancing belonging and engagement.
Professional diversity	+ Expand the skill sets of your members by recommending professional development courses. + Encourage Rotaractors to consider dual membership.
Stagnant or declining membership	+ Create a membership development plan. + Learn how to connect with prospective members through the prospective member management system. + Teach members your club's process for proposing new members and explain that they can also refer qualified prospects to other clubs. + Make sure that members are aware of all the ways they can be involved with Rotary besides through attending club meetings.
Members leaving	+ Start with the Enhancing the Club Experience: A Member Satisfaction Survey to improve current members' experience. + Learn and act on trends using the Improving Your Member Retention: A Retention Assessment and Analysis. + Use the exit survey in Understanding Why Members Leave to consider the reasons your club can address. + Let resigning members know they can rejoin or change clubs when they are ready and stay in touch in the meantime.
Orientation and Rotary knowledge	+ Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center. + Get to know new and prospective members using the member interest survey. + Give this comprehensive overview of Rotary to new members or order it for club reference.

IMAGE



Clubs that have fun and make an impact are more enjoyable for members and more attractive to potential ones. A positive public image improves your club's relationship with the community and prospective members. Make sure your club is getting credit for the service it provides. Demonstrating that your club meets real needs confirms your value to your community.

- ☐ We have a public-facing, visually appealing club website that explains what the club does, who its members are, and the benefits of membership.
- ☐ We have social media accounts that show our followers the difference we make in our community.
- ☐ Our social media accounts reach a range of audiences.
- ☐ Our club appeared in the local media several times last year.
- ☐ We promote our club and Rotary through various media in the community (television, radio, billboards, etc.).
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's brand guidelines.
- ☐ We use materials and templates from Rotary's Brand Center that show our members as people of action.
- ☐ We use marketing materials from Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary or Rotaract signs and banners at our meeting place, service project sites, and events.
- ☐ Our club's presence is known in our community.
- ☐ The club brochure we give to community members and prospects shows the impact we make.
- ☐ Our club has members who have marketing expertise.
- ☐ We build Rotary's public image by making sure our guests and the public have positive experiences with our club.
- ☐ Our club has a public image committee whose chair and members are dedicated to public image and outreach.

COMMENTS



Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	+ Find resources in Rotary's Press Center and use them in your community's media. + Plan events to raise community awareness of Rotary. Use the events guide in Rotary's Brand Center.
Outdated materials	+ Find editable club brochures and membership materials in Rotary's Brand Center. + Learn how to use Rotary's communication and design elements to build awareness and recognition of Rotary and to tell the story of people of action. + Use Rotary videos and images of your members in your materials.
Online presence	+ Find a member with the skills and time to create and manage your club website and social media pages. + Take the course The Rotary Brand in the Learning Center. + Use Rotary's Social Media Toolkit to update your digital presence.
Marketing expertise	+ Find tips in Club Public Image Committee Essentials and put members with public relations expertise on the committee. + Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise.

BUSINESS AND OPERATIONS



When your club runs smoothly, it's likely that you have good leaders who are thinking about the club's future. The leaders shape the club, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development, strategic planning, and succession planning are also ways to fortify your club.

- ☐ Our club has a strategic plan that we update regularly.
- ☐ We set annual goals and enter them in Rotary Club Central.
- ☐ Our club strives for and often earns the Club Excellence Award.
- ☐ Our club board meets at least quarterly to review our strategic plan, measure our progress toward goals, and adjust bylaws and other documents as needed.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes identifying future club leaders and preparing them for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends the presidents-elect training seminar (PETS), and club leaders attend the district training assembly.
- ☐ Club leaders use My Rotary or integrated club management software to conduct Rotary business.
- ☐ Our club elects incoming officers by 31 December and reports them to Rotary International no later than 1 February.
- ☐ Our club secretary reports new members within 30 days after they join.
- ☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.
- ☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.
- ☐ We ask our members to complete a member satisfaction survey each year and use the results to shape the club.
- ☐ More than half of our club's members have a My Rotary account.
- ☐ Our club has a club administration committee chair.

COMMENTS



Clubs that don't have skilled members in leadership roles or that neglect members' needs risk becoming ineffective and obsolete and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	+ Create a vision for your club and set long-range and annual goals using the Strategic Planning Guide. + Strive to achieve more than half of the goals in Rotary Club Central to earn the Club Excellence Award. + Select goals that are meaningful not just to the club's board but to the club as a whole. + Use Strengthening Your Membership to make a membership development plan. + Recognize members for their dedication and service to the club, community and to our organization.
Innovation	+ Update your club bylaws to include new membership types, such as family memberships. + Review the Club Types, Formats, and Models resource to review the experience your club strives to offer its members.
Processes	+ Develop standard processes for inducting and orienting new members, following up with prospective members, proposing a new member, leadership continuity, etc. + Use the member satisfaction survey.
Leadership	+ Find tips and resources in online learning plans for club leaders. + Offer leadership development opportunities and promote self-paced learning with Rotary's online professional development courses.
Managing funds	+ Take the Club Rotary Foundation Committee Essentials online course to learn about giving options. + Find best practices in Club Treasurer Essentials.
Managing your club on MyRotary	+ Use the Club Administration section of My Rotary to get reports; add, edit, or remove a member; pay your club invoice; and track your prospective members. (Note: For Rotaract, only club presidents can use the Club Administration page on My Rotary.)

WHAT'S NEXT?



Using the Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas.

Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, clubs have to adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

NEXT STEPS

1. Score each section. Each mark is worth one point.

Category	Score
Your club experience	
Service and social events	
Members	
Image	
Business and operations	

2. Look at the categories with the lowest scores. How can your club turn the suggested remedies into action? Enter your next steps below.

Action	Time frame	Person responsible

Activity 1: Club Reality Scan + SWOT Analysis

Think about your Rotary club or a club you know well.

SWOT Analysis Template (4-Quadrant Grid)

Purpose: Assess your club's internal and external environment

Instructions: List 2–4 items per quadrant, then identify priorities.

STRENGTHS Identify the internal capabilities and resources that enable your Club to operate effectively, stand out from other organizations, and achieve its mission more successfully	WEAKNESSES Identify internal challenges or limitations that hinder your Club's performance
OPPORTUNITIES Identify external factors that could be leveraged for growth or improvement	THREATS Identify external factors that could negatively impact your Club's performance

Reflection:

- Which **strength** can you leverage immediately?
- Which **weakness** is most urgent to address?
- What is one **strategic insight** from this analysis?

The **ROTARY ACTION PLAN**



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 work together to build a stronger world, **Rotary's Action Plan — our strategic plan — is leading our organization to form more meaningful connections and make a more sustainable difference through service.** Using the plan's four priorities as a guide, we're fulfilling the vision of Rotary International and The Rotary Foundation: creating healthy clubs, providing engaging experiences for all, and uniting people to take action with us to create lasting change.

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 ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill building

INCREASE OUR ABILITY TO ADAPT

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

Activity 2: Action Plan Alignment Lens

Your SWOT analysis helped identify your club's current strengths, weaknesses, opportunities, and threats. Now connect one or more of those insights to Rotary's Action Plan.

Rotary's Action Plan can help clubs ask better planning questions:

Rotary Action Plan Priority	Planning Question for My Club
Increase our impact	How can our club make a greater and more measurable difference?
Expand our reach	How can our club involve more people, partners, or community voices?
Enhance participant engagement	How can our club create a more meaningful experience for members, guests, partners, and participants?
Increase our ability to adapt	How can our club become more flexible, responsive, innovative, or sustainable?

Choose one important issue, opportunity, or insight from your Club Reality Scan or SWOT.

Planning Prompt	My Club's Response
One issue, opportunity, or concern from our scan or SWOT is:	
This connects most clearly to this Action Plan priority:	☐ Impact ☐ Reach ☐ Engagement ☐ Adaptability
Why does this priority matter for our club now?	
What would improvement look like in 1–3 years?	
Who should be involved in shaping this priority?	
What evidence would show progress?	

Activity 3: Strategic Priorities Worksheet

Use your Club Reality Scan, SWOT Analysis, and Action Plan Alignment Lens to identify possible strategic priorities.

A strategic priority should be:

- Important to the club's future
- Connected to real evidence or member/community input
- Aligned with Rotary's Action Plan
- Focused on outcomes, not only activities
- Realistic enough to move forward
- Strong enough to guide decisions beyond one Rotary year

Purpose: Identify 2–3 high-impact priorities for your Rotary club (3-year horizon)

Instructions

Focus on **outcomes, not activities**

Action Plan Priority Area (impact, reach, engagement, or adaptability)	Desired Outcome (What success looks like)	Why It Matters (Impact)	Time Horizon

Reflection:

- Which priority is most urgent?
- Which will create the greatest long-term impact?

Turn one strategic priority into a SMART goal.

[illegible]

Implementation, Mentoring, Succession, and Progress Tracking

A strategic priority becomes stronger when the club knows how it will be carried forward.

Use the questions below to test whether your SMART goal can survive beyond one person or one Rotary year.

Implementation Question	Response
Who needs to understand this goal before action begins?	
Who should help lead the work?	
Who should be mentored or prepared to continue the work?	
What committee, board, or club process should receive this plan?	
How often should progress be reviewed?	
What evidence should be tracked?	
What should happen if the club is not making progress?	
How will new club leaders learn about this priority?	

Personal Planning Commitment

Complete before leaving.

This priority connects to Rotary's Action Plan because:

- ☐ It could increase our impact
- ☐ It could expand our reach
- ☐ It could enhance participant engagement
- ☐ It could increase our ability to adapt

One insight I gained about my club is:

One strategic priority I believe my club should discuss is:

One SMART goal or improvement idea I can help move forward is:

One person I should talk with about this is:

One mentoring or succession action my club should consider is:

One first step I will take within 30 days is:

Summary / Key Takeaways

- Planning for Success is a culminating Part III session.
- Strategic planning helps clubs move from good intentions to sustained action.
- The RI Strategic Planning Guide gives clubs a practical process: determine status, develop a vision, make a plan, and track progress.
- Rotary's Action Plan helps clubs choose priorities that increase impact, expand reach, enhance engagement, and increase adaptability.
- Insightful planning begins with honest analysis of club reality.
- SWOT helps clubs examine strengths, weaknesses, opportunities, and threats.
- Strategic priorities should focus on outcomes, not only activities.
- SMART goals help turn priorities into action.
- Sustainable leadership includes strategic vision, mentoring, succession, and progress review.
- A plan is stronger when it is understood, owned, documented, reviewed, and carried forward.
- The goal is not simply to complete a planning worksheet. The goal is to strengthen the club's capacity to serve, grow, adapt, and make a lasting difference.



If You Think It, *Ink It*



The Rotary Foundation: International Service



Session Purpose

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

Session Goals

- Identify opportunities for Rotary Foundation-supported international service.
- Apply vocational skills to international service projects.
- Explain how Rotary Action Groups expand service impact.
- Develop an international service idea with need, sustainability, and impact in mind.

Core Resources

- Rotary Service Project Center
- Rotary Friendship Exchange
- Guide to Global Grants
- 6 Steps to Sustainability
- Community Assessment Tools
- Global Grant Calculator
- Rotary Action Groups resource or current official Rotary Action Groups page

Resources from either this Part III Workbook or on the website, <https://lonestarli.org/page/part-iii-participant-workbook-amp-resources-1>

Why International Service?

International Service is one of Rotary's Avenues of Service. It reflects Rotary's global reach in promoting international understanding, goodwill, peace, and practical service.

International Service may include:

- International service projects
- Global grants
- District grants with an international component
- Rotary Action Groups
- Rotary Friendship Exchange
- International project partnerships
- Vocational service applied across borders
- Peacebuilding and cultural understanding
- Support for projects connected to Rotary's Areas of Focus
- International Service allows Rotarians to connect local commitment with global impact.

Discussion:

Why do Rotarians participate in international service?

What makes international service different from local service?

What responsibilities come with serving in another community or country?

How can international service strengthen Rotary understanding, goodwill, and peace?

Notes:

Opening Reflection

In Part I, Foundation I: Our Foundation introduced why The Rotary Foundation matters and how it helps Rotarians do good locally and around the world.

In Part II, Foundation II: Targeted Service helped us think about the grant model, Areas of Focus, community assessment, and sustainability.

In this Part III session, we apply that learning to international service.

One Foundation idea I remember from Parts I or II is:

One international service question I have is:

One skill, vocation, relationship, or club strength that could support international service is:

From Targeted Service to International Service

Foundation II asked how Rotary Foundation tools support targeted service.

Part III asks how those tools can be applied internationally.

A strong international project should be able to answer:

Planning Question	Why It Matters
What need are we addressing?	Service should respond to a real community need.
How do we know this is a need?	Assumptions can lead to ineffective or disrespectful projects.
Who is the host partner?	Local Rotary and community partners understand the context.
Who is the international partner?	Strong projects require collaboration and shared responsibility.
Which Area of Focus applies?	Global grants must connect to Rotary priorities.
What vocational skills are needed?	Rotarians can contribute expertise, not only money.
How will the project be sustainable?	The benefit should continue after Rotary's direct work ends.
How will results be measured?	Impact should be clear enough to explain and evaluate.

Finding Partners and Resources

International service requires relationships and resources.

Possible sources of help include:

Resource or Partner	How It Can Help
Host Rotary club or district	Local knowledge, community relationships, project leadership
International Rotary club or district	Partnership, funding, planning, technical support
Rotary Action Groups	Technical expertise, project models, subject-matter knowledge
Rotary Friendship Exchange	Relationship-building and cultural understanding
Rotary Service Project Center	Project ideas, partners, and Rotary service resources
Guide to Global Grants	Planning, application, implementation, and reporting guidance
Community Assessment Tools	Help with listening and identifying real needs
6 Steps to Sustainability	Help with planning lasting benefit
Global Grant Calculator or current planning tool	Helps estimate funding structure and grant budget questions
District Foundation leaders	Local guidance, qualification, timelines, and grant process support

Think of an international service interest, need, or project idea.

Question	My Response
What international service issue interests me or my club?	
Which Area of Focus might connect to it?	
What kind of local or host partner would be needed?	
What kind of international partner would be needed?	
What vocational skill or technical expertise might be needed?	
Which Rotary Action Group or Rotary resource might help?	
What first question should I ask?	
Who should I ask first?	

Vocational Skills and Rotary Action Groups

Rotarians bring more than funds to international service. They bring skills, professions, networks, experience, language, leadership, technical knowledge, and relationships.

Vocational skills may include:

- Health care
- Engineering
- Education
- Water and sanitation
- Finance
- Agriculture
- Environmental science
- Conflict resolution
- Public health
- Construction
- Project management
- Monitoring and evaluation
- Communication and storytelling
- Logistics
- Legal, governance, or nonprofit experience
- Youth development
- Community economic development

Rotary Action Groups broaden our service by connecting Rotarians with specialized knowledge and humanitarian focus areas. They can help clubs and districts strengthen project ideas, find expertise, avoid common mistakes, and connect with others working in similar fields.

Reflection:

One vocational skill or life experience I could offer to international service is:

One skill or expertise my club has that may be underused is:

One Rotary Action Group or expert resource we should explore is:

A worksheet titled "If You Think It, Ink It" with a lightbulb icon and a pen icon. The title is written in a large, stylized font, with "Ink It" in a darker blue. Below the title is a large, empty space with horizontal lines for writing. At the bottom left, there is a small icon of a notepad and a pen.

Activity 2: Hypothetical Global Grant Exercise

Work in small groups. Choose one project idea below or create your own.

Project Option A: Water, Sanitation, and Hygiene

A rural school has unreliable access to clean water and handwashing facilities. A host club has identified the school as a possible partner.

Project Option B: Basic Education and Literacy

A community has low adult literacy rates, especially among women who want to start small businesses or support children in school.

Project Option C: Disease Prevention and Treatment

A clinic wants to improve early detection of a preventable disease but lacks equipment, training, and outreach capacity.

Project Option D: Community Economic Development

A local partner wants to support vocational training and microenterprise development for unemployed or underemployed adults.

Project Option E: Protecting the Environment

A community is experiencing erosion and water-quality problems linked to a damaged watershed.

Your task:

Develop a project concept. You are not completing a grant application. You are practicing the thinking that should happen before a club moves forward.

MAKE A SUSTAINABLE IMPACT

SUSTAINABILITY

For Rotary, sustainability means the capacity for outcomes to be maintained locally and to serve the community's continuing priorities.

Learn about the community

Work with community members to identify priorities and collaborate on solutions that build on community strengths and align with local values and culture.



Encourage local engagement

Identify key community members who can be involved from the beginning in developing the project and advocating for lasting improvements.



Provide learning opportunities

Help community members learn what they need to know to maintain the project outcomes.



Buy local

Purchase equipment and technology from local sources and ensure that community members can maintain the equipment.



Find local funding

Get local funding through governments, hospitals, companies, and other organizations to integrate the project locally and ensure long-term support.



Measure your success

Develop clear and measurable project outcomes and determine how you will collect your data before, during, and after the project.



Group Share-Out

Each group should share:

- Project idea
- Area of Focus
- Host or community partner
- Vocational skill or Rotary Action Group that could help
- One sustainability feature
- One next question or first step

Notes from other groups:

Strategic Thinking: Is This Project Ready?

Before a club moves forward with an international service project, it should ask:

Readiness Question	Yes / No / Not Yet	Notes
Have we identified a real community need?		
Have the people affected been consulted?		
Do we have a host Rotary partner?		
Do we have or need an international partner?		
Does the project fit an Area of Focus?		
Do we understand what vocational skills are needed?		
Have we identified possible Rotary Action Group or expert support?		
Do we understand sustainability expectations?		
Do we know what results should be measured?		
Have we consulted district Foundation leaders?		
Do we know the responsible next step?		

Personal International Service Action Plan

Complete before leaving.

One international service idea or issue I want to explore is:

One Area of Focus it may connect to is:

One vocational skill, club strength, or relationship that could help is:

One Rotary Action Group, Rotary resource, or district contact I should explore is:

One question I need answered before moving forward is:

One first step I will take within 30 days is:

Summary / Key Takeaways

International Service gives Rotarians an opportunity to serve the world community.

Foundation I introduced why The Rotary Foundation matters.

Foundation II developed grant-model thinking, targeted service, Areas of Focus, community assessment, and sustainability.

This Part III session applies that learning to international service.

Strong international service begins with listening, partnership, and respect.

Global grants require sustainable, measurable outcomes connected to Rotary's Areas of Focus.

Vocational skills can strengthen international projects.

Rotary Action Groups broaden service by connecting clubs to expertise and humanitarian focus areas.

The best international service projects include host partners, international partners, community input, sustainability, measurement, and clear next steps.

Public Image



Session Purpose

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

- Explain how public image strengthens club visibility, trust, membership, partnerships, and service.
- Identify key audiences and choose effective ways to reach them.
- Connect public image efforts to Rotary's Action Plan and community impact.
- Apply Rotary brand, voice, and storytelling tools to promote the club effectively.

Core Resources

- Rotary Brand Center
- Rotary People of Action materials
- Rotary logos, templates, and visual identity resources
- Rotary voice and messaging guidance
- Rotary social media guidance in Rotary Brand Center
- Rotary Action Plan
- Rotary Vision Statement

Resources from either this Part III Workbook or on the website, <https://lonestarrli.org/page/part-iii-participant-workbook-amp-resources-1>

Reflection

What Does the Community Know?

What does my community currently know about my Rotary club?

What do I wish the community better understood about Rotary?

What story, project, event, or relationship has helped shape my club's public image?

What story, project, event, or impact has my club not shared clearly enough?

Public Image Quick Reference

Public image includes:

- What people see
- What people hear
- What people understand
- What people remember
- What people trust
- What people are invited to do

Public image is strengthened through:

- Clear stories
- Accurate Rotary branding
- Consistent messages
- Good photos
- Respectful image use
- Visible service
- Community partnerships
- Member invitation
- Follow-up after events and projects
- Sharing impact, not just activity

A strong public image helps a club:

- Build community trust
- Attract prospective members
- Strengthen partnerships
- Support fundraising
- Increase awareness of service
- Show the value of Rotary
- Connect local work to Rotary's larger purpose
- Invite others to participate

Why Public Image Matters

Public image is not only publicity.

It is the public understanding of who we are, what we do, why it matters, and how others can connect with us.

A Rotary club's public image affects:

Area	Public Image Connection
Membership	People are more likely to visit or join when they understand Rotary's purpose and see meaningful activity.
Service	Visible service can help the community understand needs, partners, outcomes, and impact.
Partnerships	Community organizations are more likely to collaborate when they trust the club and understand what Rotary contributes.
Fundraising	Donors and sponsors need confidence that the club is credible, active, and effective.
Club pride	Members are more engaged when they see their club's work told clearly and respectfully.
Community trust	Clear, accurate, consistent messages help Rotary become known as a trusted community partner.

Audience Matters

A message is stronger when it is written for a specific audience.

The same Rotary story may need to be told differently for:

- Prospective members
- Community partners
- Local residents
- District newsletter
- Local media
- Social media followers
- Current club members
- Donors or sponsors
- Public officials
- Service project beneficiaries

Before sharing a public image message, ask:

- Who is the audience?
- What does this audience already know?
- What does this audience need to know?
- What does this audience need to feel?
- What does this audience need to do?
- What evidence, image, or quote would make the story stronger?
- What channel best fits this audience?
- How will we know whether the message worked?

Choose one real club story, project, event, or public image need.

Activity 2: Rotary Story Makeover Activity

A weak public image message often tells what happened but does not explain why it mattered.

Starting message:

“Our Rotary club had a service project last weekend. Thanks to everyone who helped.”

This message is polite, but it does not answer:

- Who benefited?
- What changed?
- Why did it matter?
- What need was addressed?
- What does this say about Rotary?
- What should the audience do next?

Activity Instructions

Work with your small group.

- Choose one audience from the list below.
- Rewrite the weak message for that audience.
- Add a stronger opening sentence.
- Identify an image, quote, or evidence that would strengthen the story.
- Choose the best channel.
- Add a call to action when appropriate.
- Be ready to share one improvement with the full group.

Possible audiences:

- Prospective members
- Community partners
- Local residents
- District newsletter
- Local media
- Social media followers
- Current club members

Activity 3: Rotary Story Makeover Worksheet

Audience	Revised Story or Message	Strong Opening Sentence	Image or Evidence Needed	Call to Action	Best Channel	What Makes This Version More Effective?

Example of a Stronger Story Pattern

Use this pattern if helpful:

Because [community need], our Rotary club [action taken] with [partners / members / volunteers]. As a result, [impact or benefit]. To learn more or get involved, [next step].

Draft:

Brand, Tone, and Channel Check

The Rotary Brand Center (<https://brandcenter.rotary.org/en-us/>) is a practical support tool. You do not need to memorize brand rules, but it is important to know where to find correct logos, templates, People of Action materials, and current visual identity guidance.

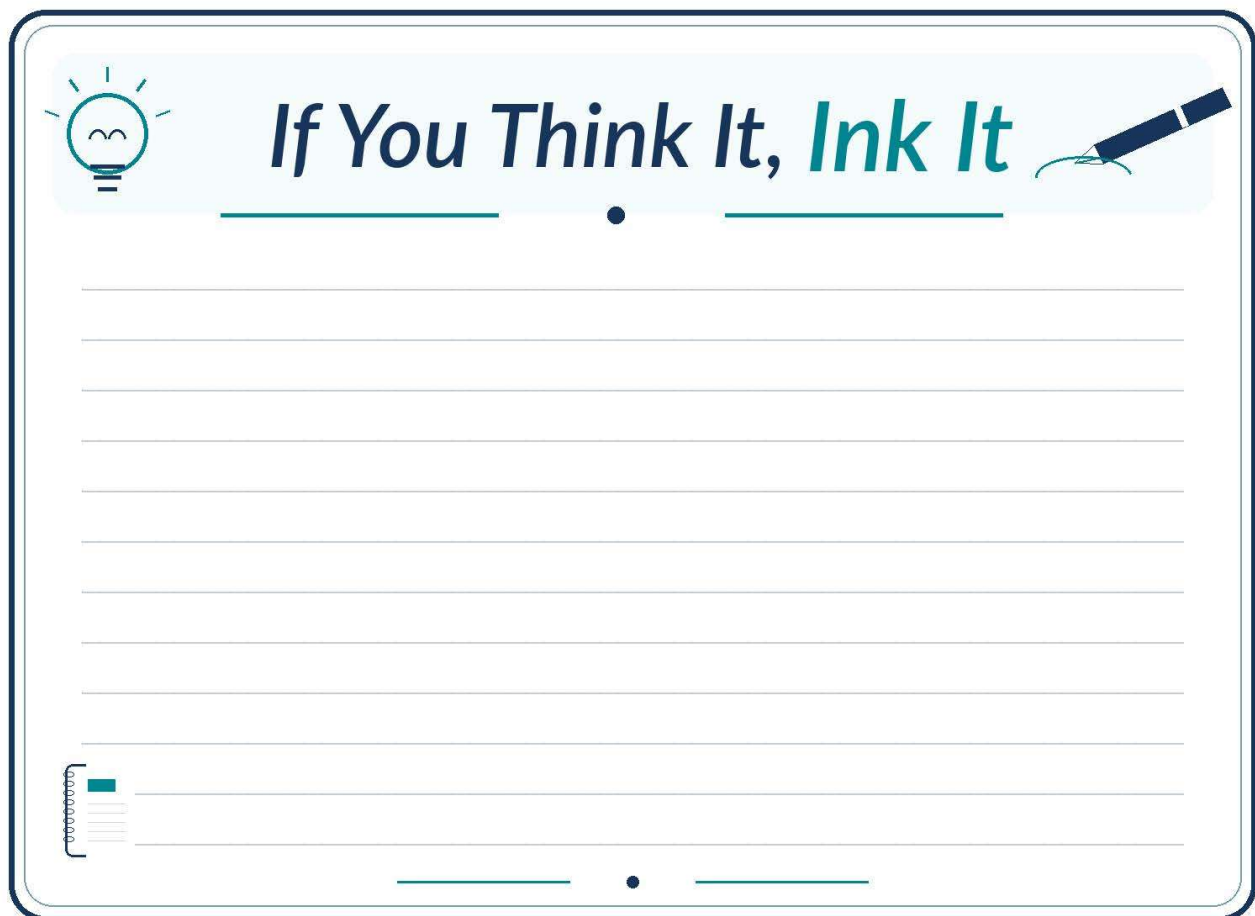
Before sharing a public image message, check:

Question	Yes / No / Needs Work
Is the message clear?	
Is the audience obvious?	
Does it show impact or meaning?	
Does it sound welcoming?	
Does it avoid Rotary jargon or explain it clearly?	
Does it use correct Rotary names, logos, and terminology?	
Does it respect privacy and photo-use expectations?	
Does it include a next step or invitation when appropriate?	
Does it reflect Rotary's values and public trust?	
Is it appropriate for the chosen channel?	

Channel Check

The same story may need a different version depending on the channel.

Channel	What Usually Works Best
Club website	Clear summary, date, purpose, impact, contact information, photos
Social media	Strong opening, good image, short message, human story, invitation
District newsletter	Rotary relevance, club name, district interest, impact, photo, contact
Local media	Who, what, when, where, why, community impact, quote, photo contact
Community partner newsletter	Shared purpose, partnership value, beneficiary impact, next opportunity
Member email	Clear role, deadline, reason it matters, next action
Event flyer	What, when, where, who should attend, why it matters, registration/contact
Fundraising message	Need, credibility, impact, how funds will be used, how to give



The **ROTARY ACTION PLAN**



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 work together to build a stronger world, **Rotary's Action Plan — our strategic plan — is leading our organization to form more meaningful connections and make a more sustainable difference through service.** Using the plan's four priorities as a guide, we're fulfilling the vision of Rotary International and The Rotary Foundation: creating healthy clubs, providing engaging experiences for all, and uniting people to take action with us to create lasting change.

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 ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill building

INCREASE OUR ABILITY TO ADAPT

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

Choose one real club story, project, event, or need.

Closing Reflection

One thing my community should better understand about Rotary is:

One Rotary story my club should tell more clearly is:

One public image habit my club should strengthen is:

One action I will take within 30 days is:

Within 30 days, I will strengthen public image in my club by:

Summary / Key Takeaways

Public image is how Rotary is seen, understood, remembered, trusted, and invited into community life.

Public image is strengthened by clear stories, accurate Rotary branding, respectful images, consistent messages, and visible service.

A strong public image supports membership, partnerships, fundraising, service, and community trust.

A good Rotary story shows impact, not just activity.

The audience determines the message, channel, image, tone, and call to action.

The Rotary Brand Center is a practical tool for logos, templates, visual identity, People of Action materials, and message support.

Building a Stronger Club



Session Purpose

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

Session Goals

- Compare the expectations of Rotarians to the club experience.
- Identify the ways in which a Rotarian can assist the club by increasing its vibrancy and meeting a variety of needs.
- Explore the consequences of met and unmet expectations.
- Explore the diverse expectations of members and how to meet those expectations through Rotary's five avenues of service.

Core Resources

- How Expectations Might Differ
- Guiding Principles of Rotary
- Five Avenues of Service
- Expectation & Delivery Exercise
- Ideas to Perk Up Club Meetings and Events
- Rotary Magazine

Resources from either this Part III Workbook or on the website, <https://lonestarrli.org/page/part-iii-participant-workbook-amp-resources-1>

Opening Reflection

Rotary's Promise and My Club Experience

Why did I originally join Rotary?

Has my reason for being involved in Rotary changed?

What do I expect from my Rotary club today?

What do I think prospective members expect when they visit or consider joining?

What does "delivering on Rotary's promise" mean in my club?

Strong Clubs Understand Expectations

Strong clubs do not assume that every member wants the same experience.

Members and prospective members may have different expectations because of:

- Age or generation
- Career stage
- Retirement status
- Family responsibilities
- Work schedule
- Availability
- Preferred communication style
- Technology comfort
- Service interests
- Accessibility needs
- Cultural background
- Prior Rotary experience
- Expectations about formality, flexibility, leadership, and time
- Desire for fellowship, service, networking, learning, or impact

Strong clubs strive to identify and understand members' expectations and develop ways to meet or exceed expectations through appropriate planning and implementation.

ACTIVITY 1

How Expectations Might Differ

Think about your club. For each expectation factor below, consider how it might shape a member's or prospective member's club experience — and what that means for your club.

Strong clubs listen for expectations instead of assuming one club experience fits everyone.

Expectation Factor	How This Might Affect Club Experience
Meeting time and length	
Meeting format	
Family or work responsibilities	
Preferred service opportunities	
Fellowship and social connection	
Networking and vocational connection	
Leadership opportunities	
Communication style	
Technology access or comfort	
Accessibility needs	
Public image and community visibility	
Club traditions	
Desire for measurable impact	

Reflection

What group or perspective is **most represented** in my club?

Who might be **underrepresented** in my club?

How could this information **help my club**?

How could this information help the **membership committee, program chair, fundraising team, events team, or service project team**?

Reflection:

What group or perspective is most represented in my club?

Who might be underrepresented in my club?

How could this information help my club?

How could this information help the membership committee, program chair, fundraising team, events team, or service project team?

A worksheet titled "If You Think It, Ink It" with a lightbulb icon and a pencil icon. The page has a light blue header and a white body with horizontal lines for writing. A small spiral notebook icon is in the bottom left corner.

ACTIVITY 2

Five Avenues and Member Expectations

Rotary's Five Avenues of Service help clubs offer multiple ways for members to find meaning, contribute, and grow. Use the reference below, then complete the activity table for your club.

QUICK REFERENCE · FIVE AVENUES OF SERVICE AS EXPECTATION PATHWAYS

Avenue of Service	How It May Help Meet Member Expectations
Club Service	Builds strong relationships, meaningful meetings, leadership roles, and active membership development.
Vocational Service	Helps members use their occupations, skills, and ethical leadership as opportunities to serve society.
Community Service	Gives members ways to improve quality of life in their communities and serve the public interest.
International Service	Connects members to global understanding, peace, international partnerships, and service beyond the local community.
Youth Service	Empowers youth and young professionals through leadership development programs and mentoring opportunities.

Activity

Choose **two or more** different member types or expectation patterns from your club. For each, identify which Avenue of Service might help the club meet that expectation, and note a specific club opportunity or action.

Member Expectation or Need	Avenue of Service That Could Help	Club Opportunity or Action

Discussion

Which Avenue of Service does my club **use most often**?

Which Avenue of Service might help us **engage members we are not currently reaching**?

How could the Five Avenues help our club meet a **wider variety of member expectations**?

Service Projects and Member Expectations

Service projects are one of the most visible ways a club delivers Rotary's promise.

But not every service project meets every member expectation.

Discuss:

Do your club's service projects meet your members' expectations? How do you know?

Why or why not?

What if all the projects for the year focused on one specific and impactful community need rather than a variety of community needs?

How does your club balance member interests, community needs, club capacity, and measurable impact?

What Do Members and Prospects Expect?

Clubs often set expectations **formally and informally** — through invitations, meetings, service projects, reputation, and daily interactions. Check the sources that apply to your club. Add any sources unique to your situation at the bottom of each list.

A Prospective Member may develop expectations from...

- ☐ A personal invitation
- ☐ A club website or social media page
- ☐ A service project
- ☐ A fundraiser
- ☐ A guest visit
- ☐ A sponsor or proposer
- ☐ A speaker event
- ☐ A community reputation
- ☐ A conversation with a current member
- ☐ A new member orientation

Additional sources in our club:

- ☐ _____
- ☐ _____
- ☐ _____

A Current Member may develop expectations from...

- ☐ Club traditions
- ☐ The meeting experience
- ☐ Committee work
- ☐ Leadership opportunities
- ☐ Service projects
- ☐ Communication habits
- ☐ Mentoring
- ☐ Recognition
- ☐ Follow-up
- ☐ District or Rotary experiences

Additional sources in our club:

- ☐ _____
- ☐ _____
- ☐ _____

Discussion

What do the **members of your club** expect?

Does your club **set expectations** with its target audience about membership? How?

Does this differ for **current members versus prospective members**?

Does it differ based on **age, position in the workforce, or retirement status**?

Do **all your members set the same expectations** for prospects?

Expectation & Delivery Exercise

Main Application Activity

Purpose: Compare what members and prospective members *expect* from your club with what the club *actually delivers*. Use your own club as the reference — be specific. The goal is not to criticize your club; the goal is to identify **one realistic improvement** you can help move forward.

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

Step 1 — Identify Expectations

What do members or prospective members expect from your club? List specific expectations and indicate who holds them.

Expectation	Current Members, Prospects, or Both?	How Do We Know?

Step 2 — Compare Expectations to Club Experience

For each expectation, evaluate how well your club currently delivers on it.

Expectation	Does the Club Deliver? Yes / Partly / No	Evidence or Example

Step 3 — Consequences of Met and Unmet Expectations

What actually happens in your club when expectations are met — or not met?

Expectation	If Met — What Happens?	If Unmet — What Happens?

Step 4 — Realistic Club Response

What could the club realistically do to meet or exceed these expectations? Focus on actions practical within your club's current capacity.

Improvement Idea	Who Should Be Involved?	First Step	Timeframe

Step 5 — Personal Ownership

What can I personally do to help my club deliver on Rotary's promise? Complete each prompt.

One expectation my club **should understand better** is:

One thing my club **already does well** to deliver on Rotary's promise is:

One **gap between expectations and club experience** that I noticed is:

One **realistic improvement** my club could make is:

One action **I** can personally take, and I will take it by:



"If You Think It, Ink It"

Within **30 days**, I will take this step to help build a stronger club:

Peer Share Notes

Share with one partner or table: one expectation met well · one unmet · one consequence · one improvement · one personal action.

Notes from my partner or table:

Strategic Thinking Prompt

Building a Stronger Club · Follow-Up Application

A stronger club is not built by one meeting idea or one new activity. **Stronger clubs connect expectations to planning and implementation.**

Choose one improvement idea from your Expectation & Delivery Exercise and complete the table below.

Strategic Thinking Prompt

Strategic Question	My Response
What expectation are we trying to meet?	
Why does this matter to club strength?	
How does this connect to our club's goals or strategic plan?	
Who needs to be involved?	
What is one realistic first step?	
How will we know whether it helped?	

Action Planning · Complete before leaving

Use your responses above to complete each prompt. Be specific.

One expectation my club **should understand better** is:

One thing my club **already does well** to deliver on Rotary's promise is:

One **gap between expectations and club experience** is:

One **realistic improvement** my club could make is:

One action **I** can personally take is:

I will take this action by: _____

Ideas to Perk Up Club Meetings and Events

Use these ideas as possible examples, not as a checklist every club must complete.

- Hold a speed networking event within the club to help members build relationships.
- Put aside one scheduled meeting per month to do service in the community.
- Meet in small groups on a regular basis with a focus on Rotary learning, getting to know one another, or committee planning.
- Vary the format of club meetings.
- Invite someone from another club to speak about how they have successfully used different meeting formats.
- Link with Rotaractors and Interactors to conduct a mutually planned meeting.
- Invite “lost members” to a meeting.
- Invite back past presidents who have left the club.
- Meet at a different time or location.
- Have a Vocational minute once a month.
- Have a Foundation minute once a month.
- Have members attend another local club’s meeting instead of the regularly scheduled meeting.
- Meet at a local business once or twice a year.
- Have a greeter meet all members and guests upon arrival.
- Invite local organizations that have benefited from the club’s activities to attend a celebration meeting.

Reflection:

Which idea might help my club meet a member expectation?

Which idea might not fit my club, and why?

Summary / Key Takeaways

Strong clubs strive to identify and understand members' expectations and develop ways to meet or exceed expectations through appropriate planning and implementation.

Strong clubs are a result of planning and implementation.

Member expectations may differ by generation, life stage, vocation, availability, accessibility needs, service interests, preferred communication style, and personal values.

The Five Avenues of Service help clubs meet diverse expectations through multiple pathways for participation.

Met expectations can increase trust, participation, satisfaction, belonging, and retention.

Unmet expectations can lead to confusion, frustration, disengagement, and member loss.

A stronger club aligns what it promises, what members experience, and what it can realistically deliver.

Every Rotarian can assist the club by increasing its vibrancy and helping meet a variety of needs.

Making a Difference



Session Purpose

As I further my Rotary journey, I will connect my growth through RLI to Rotary's Vision and translate learning into action to stay engaged and engage others.

Session Goals

- Apply knowledge and skills acquired in RLI to a specific club or Rotary leadership situation.
- Share an action plan for addressing a specific situation in the participant's club or Rotary role.
- Apply implementation basics — awareness, understanding, behavioral change, and advocacy — to strengthen follow-through.
- Provide feedback to the RLI team on specific elements of the program.
- Celebrate completion of the RLI learning journey.

Core Resources

- Worksheet A: Vision → Impact → Invitation
- My RLI Personal Action Plan
- RLI Core Courses / Curriculum Summary

Resources from either this Part III Workbook or on the website, <https://lonestarrli.org/page/part-iii-participant-workbook-amp-resources-1>

Welcome and Capstone Frame

This is the final capstone session of the RLI learning journey.

Throughout RLI, you have explored Rotary, leadership, ethics, membership, service, communication, Foundation work, teamwork, public image, strategic planning, and personal action.

This session asks:

- What have I learned?
- How has RLI changed how I see myself as a Rotarian?
- How can my Rotary story help me stay engaged and engage others?
- What is one specific action I will take because of RLI?
- Who will help me follow through?

This capstone session helps you name your growth, connect it to Rotary’s Vision, and translate learning into action. You will craft a brief Impact Story from your Rotary journey to help you stay engaged and engage others, then use an implementation model to plan a practical next step in your club or personal Rotary leadership. The session closes with commitment, accountability, feedback, and **celebration!**

RLI Core Courses & Curriculum LONE STAR DIVISION ROTARY LEADERSHIP INSTITUTE		
PART I The Rotarian <i>Who am I as a Rotarian and leader?</i>	PART II The Club <i>How do we build a stronger club?</i>	PART III The Journey <i>Where do I go from here?</i>
1 My Leadership in Rotary 2 My Rotary World 3 Ethics and Vocational Service 4 Foundation I: Our Foundation 5 Engaging Members 6 Creating Service Projects	1 Rotary Opportunities 2 Effective Leadership: Coalition Building 3 Attracting Members 4 Club Communication 5 Foundation II: Targeted Service 6 Team Building	1 Planning for Success (Strategic Planning) 2 The Rotary Foundation: International Service 3 Public Image 4 Building a Stronger Club 5 Making a Difference

WORKSHEET A

Vision → Impact → Invitation

Reflection • Engagement • Action

ROTARY 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.”

After writing, underline one phrase you may want to carry into your Impact Story.

Step 1 — Personal Reflection

Write what is true. Do not try to write the perfect answer.

People unite — When have I experienced belonging or fellowship in Rotary?

Take action — What is one action I took, helped lead, or now want to take because of Rotary?

Lasting change — across the globe: Where have I seen Rotary make a difference beyond my local club?

Lasting change — in our communities: Where has my club or district made a difference locally?

Lasting change — in ourselves: What changed in me because of Rotary or RLI? Consider confidence, empathy, leadership, purpose, friendships, skills, or commitment.

My 60-Second Impact Story

Use the structure below to build a story you can use to welcome a member, invite a guest, re-engage someone drifting, inspire your club, or support a service ask.

Before Rotary, I...

Then I experienced... *A moment, project, person, meeting, service experience, or turning point.*

Now I... *What is different in me? How do I show up differently?*

My invitation line:

"If you care about _____, you'd love Rotary because _____."

Make It Usable — Check one primary use for your story:

- | | |
|---|---|
| ☐ Welcome a new member | ☐ Inspire my club during a meeting |
| ☐ Invite a guest | ☐ Support a service / project ask |
| ☐ Re-engage a drifting member | ☐ Encourage someone to attend RLI |
| ☐ Explain why Rotary matters to me | |

Other: _____

Pair / Triad Story Sharing

Listeners respond with:

- ▶ One word or phrase that stood out
- ▶ One moment where the story felt meaningful
- ▶ One suggestion to make the invitation line stronger

Speaker notes:

What word or phrase did others hear in my story?

What part of my story seemed strongest?

What could I make clearer or more inviting?

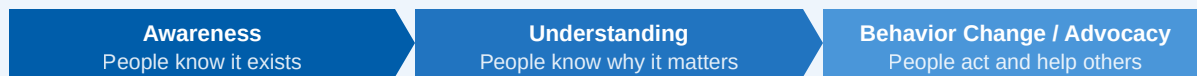
How might I use this story?

WORKSHEET B

PART 1 OF 2 · GROUP ACTIVITY

Implementation Mini-Lab

IMPLEMENTATION MOVES THROUGH THREE STAGES:



A common mistake: moving too quickly past **Understanding**. People may know a change is happening but not understand why it matters, what is expected of them, or how they can participate.

Your Group's Task

Step 1 — Choose one scenario below, or check “Our own situation” and describe it on the line provided.

Step 2 — Work through the Implementation Map together. For each stage, write your group's specific ideas and plans in the **right-hand column only**.

Choose your scenario — or describe your own:

☐ **A · New Member Onboarding**

Club wants new members engaged sooner, but members aren't sure why a new process is needed or who should be involved.

☐ **B · Retention and Belonging**

Members attend less often and feel less connected. Leaders want to improve engagement but don't agree on the cause.

☐ **C · Service Participation**

The club has strong projects, but participation is declining. A few members do most of the work.

☐ Our own situation:

☐ **D · Public Image**

The club does good work but the community doesn't understand Rotary's impact or how to get involved.

☐ **E · Leadership Continuity**

Roles rotate, but knowledge and momentum are often lost. The club struggles to develop and prepare future leaders.

☐ **F · Foundation Participation**

Members don't understand how giving, grants, Areas of Focus, and service connect.

Stage	Guiding question for this stage	 Our group's plan — write here
Awareness	<i>What do people need to know exists, needs attention, or is changing?</i>	
Understanding	<i>What do people need to understand before the change will stick?</i>	
Behavior Change / Advocacy	<i>What do we want people to do, support, or explain to others?</i>	
Barrier	<i>What may cause people to resist, ignore, or misunderstand this?</i>	
Support	<i>What relationship, resource, communication, or training would help?</i>	
First Step	<i>What is one specific, realistic first step?</i>	

Shift from group to individual. You just mapped an implementation challenge together. Now apply the same thinking to a real situation in *your own* club or Rotary role — one where change needs more than an announcement. Your responses here can strengthen the action plan you will build next.

The change — What specific improvement, project, or leadership action in your club or Rotary role needs more than an announcement to succeed?

Awareness — What do people in your club already know about this change or situation?

Understanding — What do they still need to understand — about why it matters, what is expected of them, or how they can participate?

Involvement — Who needs to be involved, consulted, or prepared before action is expected of others?

Lasting change — What would make this improvement more likely to outlast one meeting, one leader, or one Rotary year?

→ **Carry this forward.** When you complete *My RLI Personal Action Plan*, return to your response above. Your best insight from this reflection — the change you identified, who needs to understand it, and what it would take to make it last — is the foundation for your SMART goal.

My RLI Personal Action Plan

Making a Difference · RLI Capstone Session

Complete before leaving. This plan is yours to keep privately.

Participants should leave with a plan they can execute in the next 7 days.

Goal

Here is one thing I plan to do differently because of my RLI experience:

SMART Objective

SMART Element	My Response
Specific — <i>What exactly will I do?</i>	
Measurable — <i>How will I know progress occurred?</i>	
Achievable / Agreed to — <i>Is this realistic, and who must agree or support it?</i>	
Relevant / Result-oriented — <i>What result or impact should this create?</i>	
Time-framed — <i>What is the goal attainment date?</i>	

MY RLI PERSONAL ACTION PLAN · CONTINUED · PAGE 2 OF 3

Action Steps to Achieve This Goal

Helpful People or Tools

Who or what can help me achieve my goal?

Additional Training or Knowledge I May Need

Why This Matters

Who benefits if I follow through?

What will be different if I take this action?

Understanding Checkpoint

What must others understand before the change will stick?

MY RLI PERSONAL ACTION PLAN · CONTINUED · PAGE 3 OF 3

My First Step in 7 Days

My first step must be specific and calendar-ready.

Within 7 days, I will:

Date or deadline:

Accountability

Who I will tell:

When I will tell them:

When I will check back:

Story Connection

One sentence from my Impact Story that I can use while working this plan:

How I Plan to Celebrate My Success

Signature

Date

→ Bring your plan to life.

Tell one person. Take your first step within 7 days. Your RLI journey continues with action.

Accountability Partner

Making a Difference · Capstone Commitment Step

Accountability transforms a workshop moment into a leadership habit. You do not need a formal coaching relationship. You need one person who knows your commitment and can ask: *“Did you take your first step?”*

Do not leave this session with a private intention only. **Tell one person what you will do.**

Find One Partner · Briefly Share Each of the Following

- ▶ Your goal
- ▶ Your first 7-day step
- ▶ What support would help you follow through
- ▶ Who you will tell
- ▶ When you will check back

Partner Notes

My accountability partner is:

Their first step is:

My first step is:

Our check-in date or method is:

Keep this page with your My RLI Personal Action Plan. Your partner's name and your check-in date are the two most important things you can record right now.

RLI Feedback Capture

Making a Difference · RLI Capstone Session

Your feedback helps strengthen the RLI experience for future participants. **Complete before leaving — this form is collected by your facilitator.** Be specific. One honest, concrete response in each row does more than a general impression.

Prompt	My Response
KEEP <i>One thing RLI should keep exactly as-is is:</i>	
IMPROVE <i>One improvement that would strengthen RLI is:</i>	
MISSING <i>One topic I expected or wanted more depth on is:</i>	
BURNING QUESTION <i>One question I still have about Rotary or leadership is:</i>	
APPLY <i>One RLI idea I am most likely to use is:</i>	

Thank you — your feedback is reviewed and used to improve every future RLI session.

Celebration Close

RLI Part III · Capstone Session

RLI is not only a course. It is part of your Rotary journey.

YOU HAVE EXPLORED:

- ✓ Who you are as a Rotarian and leader
- ✓ How Rotary is organized
- ✓ Ethics and Vocational Service
- ✓ The Rotary Foundation
- ✓ Member engagement
- ✓ Service-project design
- ✓ Rotary opportunities
- ✓ Membership attraction
- ✓ Team building
- ✓ Targeted service
- ✓ Strategic planning
- ✓ International service
- ✓ Public image
- ✓ Stronger clubs
- ✓ Personal action
- ✓ Coalition building
- ✓ Club communication

Final Reflection

One thing I am taking from RLI is:

One way I will make a difference is:

One word that describes my Rotary journey now is:

*Write your word
here*

Congratulations on completing RLI Part III.

Service Above Self — Your Rotary journey continues.

Summary / Key Takeaways

Making a Difference is the culminating RLI session.

The session connects meaning, story, implementation skill, planning, commitment, accountability, feedback, and celebration.

Rotary's Vision gives participants a way to connect personal growth to global and local action.

An Impact Story helps Rotarians stay engaged and engage others.

Implementation requires awareness, understanding, and behavior change / advocacy.

Do not move too quickly through the understanding phase.

A meaningful action plan includes a SMART goal, first step, support, accountability, and a way to celebrate progress.

RLI learning should lead to visible action in clubs, districts, communities, and personal Rotary leadership.

Participants leave with a story they can tell and a plan they can execute.

The graphic is a stylized notepad with a dark blue border. At the top left is a lightbulb icon with a smiling face. To its right, the text "If You Think It, Ink It" is written in a large, dark blue, sans-serif font. A pen icon is positioned to the right of the text. Below the title, there are ten horizontal lines for writing. At the bottom left, there is a small icon of a notepad with a checklist. The entire graphic is set against a light blue background.

YOUR ROTARY JOURNEY CONTINUES

Congratulations on completing LSRLI Part III



Lone Star Division Rotary Leadership Institute

Your growth as a Rotary leader doesn't end here. Put what you've learned into practice — enroll in an upcoming LSRLI graduate course, or take the next step and pursue Facilitator Certification to help lead the next class of Rotary leaders.

Explore Upcoming Events at www.lsrli.org

Graduate courses • Facilitator certification

Find Your Passion in Rotary

The Rotary Leadership Institute International is not an official training program of Rotary International