

Find Your Passion in Rotary



Lone Star Division RLI

A Joint Project of over 400 of Rotary Districts Worldwide

2024-2025 Participant Materials

Participant - PART III



Lone Star Division 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



SCAN ME

RLI Part III – The Journey

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

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

Our Mission: International Rotary Leadership Institute 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)

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



The Rotary Foundation: International Service

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



Public Image

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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.



Building a Stronger Club

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



Making a Difference

51

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.

Planning for Success

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



Session Goals:

- Understand the value and process for strategic planning
- Analyze my Rotary Club
- Review possible areas of improvement
- Discuss how specific improvements could be made

Resources:

- Rotary Club Central, requires login at myrotary.org
- Rotary Club Health Check
- Membership Assessment Tools
- Strategic Planning Guide

Session Topics:

1. Rotary International suggests that clubs develop strategic plans.
2. Does your club have a plan?
3. Have those plans worked? Why? Why not?
4. How can you make a plan that works?
5. Who should be involved?
6. What is the first step in creating a strategic plan?
7. Exercise!
8. How do we turn this knowledge into goals? How can we learn more about our club?
9. Exercise!

10. What challenges might you face in implementing a plan?

11. Can the plan be changed? Why or why not? If yes, how often?

12. What could a strategic plan mean to the future of your club?

Summary:

- Planning today determines your future
- Every voice should be heard

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

Action with vision brings hope to the world.”

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

SMART GOALS

S Specific

M Measurable

A Attainable

R Relevant

T Time Stamped

Strategic Planning Simplified

Step 1 Where Are We Now

Step 2 Develop / Review Club
Vision Statement

Step 3 Review Key Strategies of
district & Rotary
International Action Plan

Step 4 Establish Tactics for Each
Strategy (3-5)

Step 5 Prepare a Goal for Each
Strategy

Step 6 Implement & Monitor At Board Meetings & Semi-
Progress Annually With the Club

WORKING TEMPLATE FOR A CLUB'S STRATEGIC PLAN

Strategy #1: Increase Our Impact	
Evidence-based programs define and measure our impact. We can improve our projects and outcomes, creating even more effective change.	
TACTICS	FIRST YEAR GOALS

Strategy #2: Expand our Reach	
We can expand our club's capacity for doing good by welcoming and engaging people of action with a variety of experiences, cultures, and perspectives.	
TACTICS	FIRST YEAR GOALS

Strategy #3: Enhance Participant Engagement

We can meet our members' diverse needs and keep them engaged while helping them with their personal and professional goals. Active and intentional member engagement will make our clubs stronger and assist us in creating meaningful relationships.

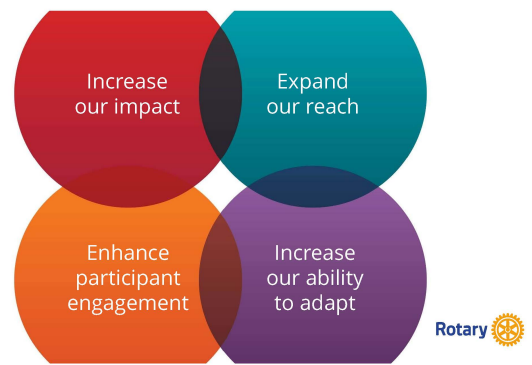
TACTICS	FIRST YEAR GOALS

Strategy #4: Increase Our Ability to Adapt

New projects, new clubs and new perspectives will maintain our connections and ability to make a difference.

TACTICS	FIRST YEAR GOALS

Below are some suggested activities that clubs could do to follow through with the four Strategies associated with Rotary's Action Plan.



- Match each activity to ONE of the four Strategies in the Rotary Action Plan.
- Which one(s) might best be suited to your club's needs and aspirations at this time ... or ... which one(s) of these best match your club's vision?
- If applicable, modify one of these suggested activities to match your club's needs and aspirations and link it to one of the four strategies.
- Identify the main issues/concerns/needs in your local community.
- Review your club's use (or lack of such) of emerging technologies.
- Survey your members to see what is important to them in a club experience.
- Budget for new ideas and initiatives that might help your club to be more responsive to the local community.
- Use the Rotary Learning Center courses as part of a regular Rotary Club meeting.
- Use social media to tell the community what your club does.
Apply for a District or Global grant to support a project.
- Review club activities to determine which ones can be streamlined or eliminated in order to free up time for impactful activities.
- Survey your community with the intent of establishing a new club using one of the flexible models available.
- Incorporate succession planning into your club's annual processes.

Strategic Planning Guide (SWOT)

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.

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

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

List 5 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: _____

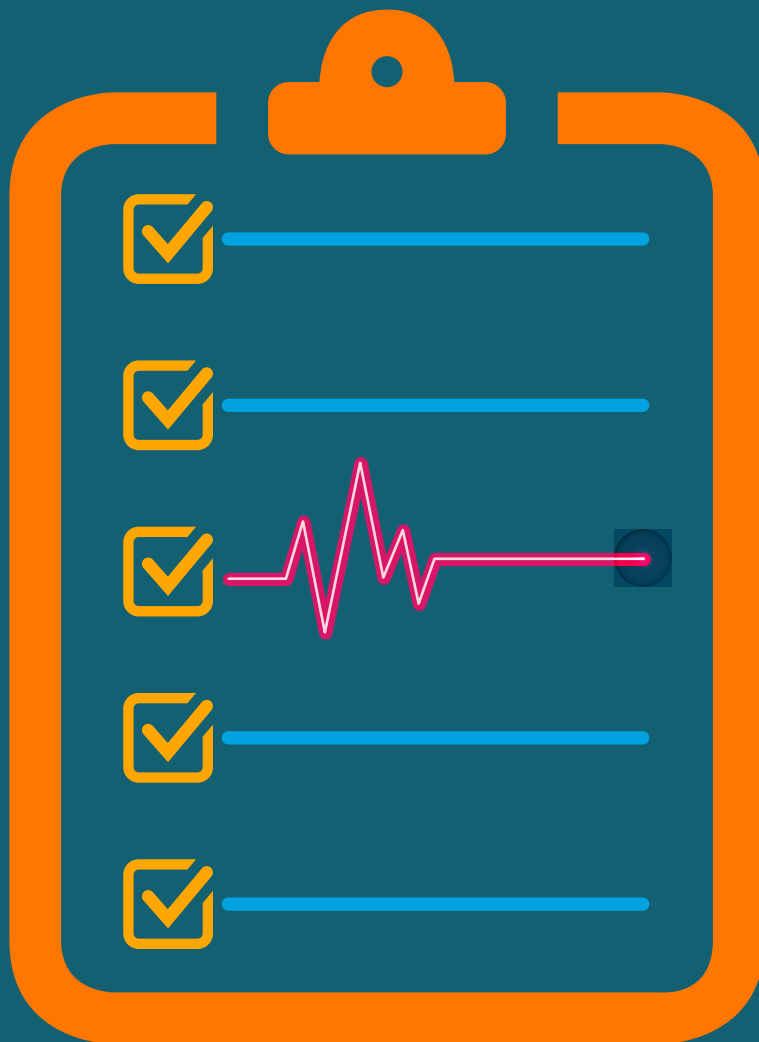
Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

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.



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 Club and District Support representative or your regional membership officer 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 online courses developed by Toastmasters International.

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 visit My Rotary Discussion Groups, attend 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.
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.

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 Rotaractors, 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	+ Attract a wide array of members by using Diversifying Your Club: A Member Diversity Assessment. + Learn about Rotary's Commitment to Diversity, Equity, and Inclusion and related efforts.
Professional diversity	+ Expand the skill sets of your members by recommending professional development courses.
Stagnant or declining membership	+ Create a membership development plan. + Learn how to connect to prospective members and manage your membership leads in one place. + Target prospective members using this exercise. + 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. + Encourage Rotaractors to consider dual membership.
Orientation and Rotary knowledge	+ Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center.

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. + Follow the Visual and Voice Guidelines in any materials your club creates. + 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 videos and images and videos of your own members. + Use Rotary's Social Media Toolkit to update your digital presence.
Marketing expertise	+ Find tips in Club Public Image Committee Basics 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. + Refresh your club's social media presence using the Social Media Toolkit in Rotary's Brand Center.

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 Rotary Citation.
- ☐ 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 Rotary Citation. + Rotaract clubs should use the Citation Goals and Instructions worksheet. + 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.
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 Basics online course to learn about giving options. + Find best practices in Club Treasurer Basics.
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 membership leads. (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

FEATURED RESOURCES

[Club Planning Assistant](#)

[Membership Assessment Tools](#)

[Membership resources](#)

[Brand Center](#)

[Learning Center](#)

The Rotary Foundation: International Service



As I further my Rotary journey, our Rotary Foundation affords me 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 Rotary Action Groups broaden our service
- Explore ideas for international service

Resources:

- Rotary Service Project Center
- Rotary Friendship Exchange
- Guide to Global Grants
- 6 Steps to Sustainability
- Community Assessment Tools
- Global Grant Calculator

Session Topics:

1. What is International Service? What projects have you been involved with?
2. Why do we do international service?
3. What kinds of grants are available for an international project?
4. What is the difference between using a District Grant or a Global Grant for an international project?
5. If we want to apply for a Global Grant, what do we need to have?

6. How can we utilize our vocational skills in international service?
7. How can we find an international project? What if we want a partner for a project in your country?
8. Exercise!

Summary:

- International Service is part of the Object of Rotary
- There are many ways to create and fund international service projects.

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**

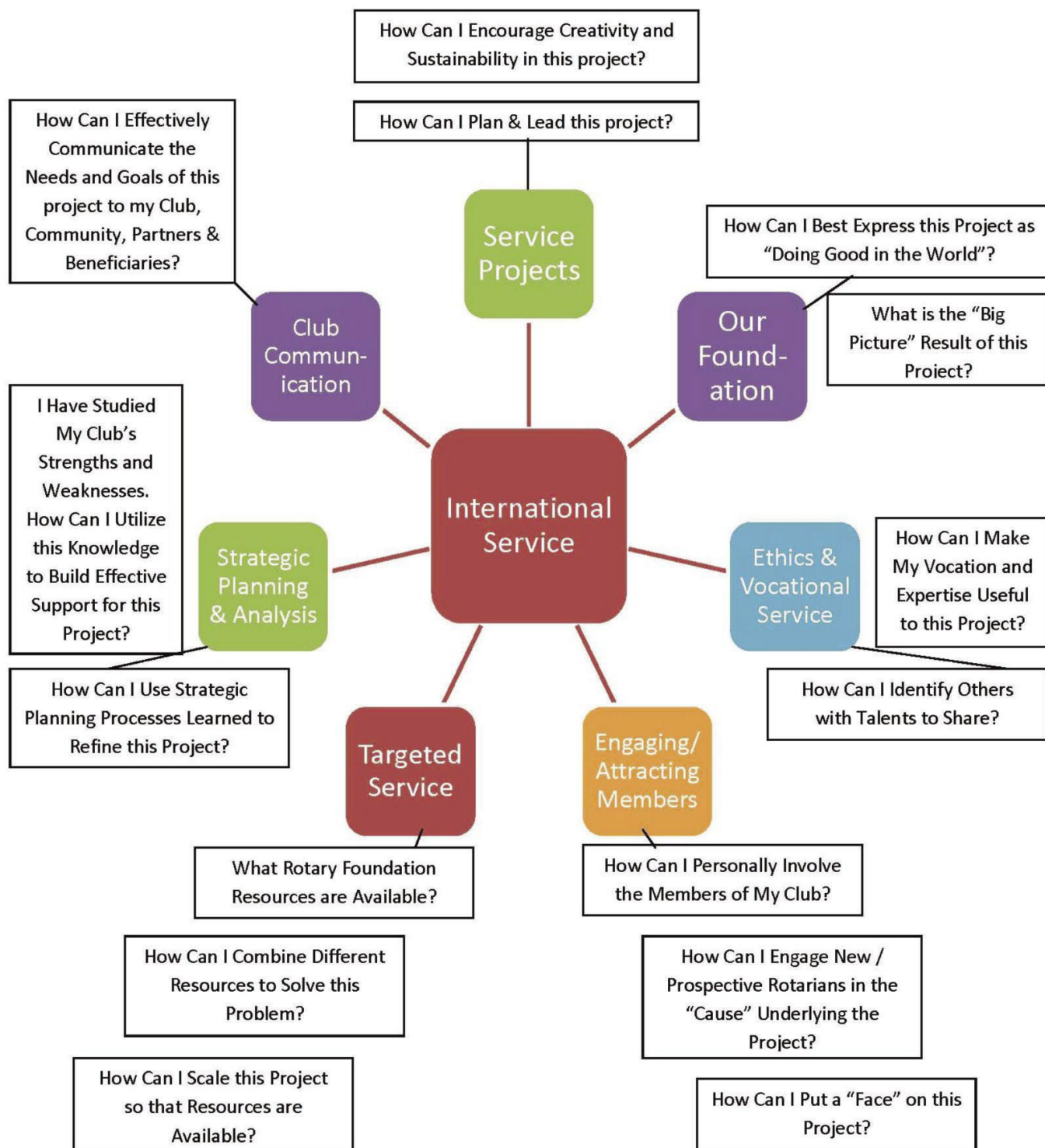
Global Grant projects must adhere to specific criteria.
Visit the Grant Center at www.rotary.org.

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 Service Project Center** 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.

Bringing It Together in International Service



8—Exercise on Global Grant Funding

On the following page is an example of the funding model for a Global Grant. Review the model before completing the exercise on the following page.

Criteria for your funding model:

- The Grant budget requires funding of USD 40,000. The Host club (where the project will occur) can only contribute USD 1,000 and the Host District is unable to contribute any funds.
- No funds are available from Endowed/Directed Gifts or TRF Donor Advised Funds. No funding is available from Other Donors.

Clue: Go back to your Resources on page 25 and download the Global Grant Calculator. Ensure that all figures are whole numbers, and follow the restrictions listed at the bottom of the table.

SAMPLE GG FUNDING CALCULATION

International Rotary Leadership Institute

Please list all financing and indicate Cash or District Designated Fund (DDF) amounts.

Global Grant Financing Planner					
Application #		GG2012345			
Project Country		Utopia			
DDF (USD)	Cash Direct to Project (Equiv USD)	Cash through TRF (Equiv USD)			
		Project Cash	5%	Total to TRF	
1. Host Rotary Clubs/Districts					
District 1234	\$ 5,000	\$ -	\$ -	\$ -	\$ -
Rotary Club of ABC		2,000		-	-
Rotary Club of DEF			3,000	150	3,150
				-	-
				-	-
				-	-
				-	-
				-	-
Total Host Contributions		\$ 5,000	\$ 2,000	\$ 3,000	\$ 10,000 22%
2. International Rotary Clubs/Districts					
District 5678	\$ 20,000	\$ -	\$ -	\$ -	\$ -
District 6789 (Cash)		5,000		-	-
Rotary Club of UVW		5,000		-	-
Rotary Club of XYZ			5,000	250	5,250
				-	-
				-	-
				-	-
				-	-
				-	-
				-	-
Total International Contributions		\$ 20,000	\$ 10,000	\$ 5,000	\$ 35,000 78% ¹
		\$ 25,000	\$ 12,000	\$ 8,000	Total Rotarian Contributions \$ 45,000 100%
3. TRF World Fund match (80% of DDF)		\$ 20,000	World Fund match		20,000 ²
4. Endowed/Directed Gift #	T12345		\$ 10,000	(5% NA)	10,000
5. TRF Donor Advised Fund			\$ 10,000	(5% NA)	10,000
Total Global Grant Funding					\$ 85,000 ³
6. Other donors (unmatched)					
MNO Foundation	\$ 2,000	\$ -	\$ -	\$ -	
PQR Corporation		5,000	250	5,250	
		-	-	-	7,000 ⁴
Total Project Funding (must be equal to budget)					\$ 92,000

Ensure that all figures are whole numbers

¹ Contributions from the international partner must be a minimum of 15%.

² (80% of DDF, 0% of Cash) There is no minimum World Fund match. Maximum World Fund match is \$400,000.

³ Total funding must be at least \$30,000

⁴ Please identify the source(s) of other funding.

Non-Rotarian contributions may not come from a cooperating organization or a beneficiary of the project.

Contributions from individual Rotarians should be entered in the application under the Club's name.

Please list all financing and indicate Cash or District Designated Fund (DDF) amounts.

Global Grant Financing Planner					
	Application #	GG2501234	Project Country	Utopia	
	DDF (USD)	Cash Direct to Project (Equiv USD)	Cash through TRF (Equiv USD)		
			Project Cash	5%	Total to TRF
1. Host Rotary Clubs/Districts					
	\$ -	\$ -	\$ -	\$ -	\$ -
				-	-
				-	-
				-	-
				-	-
				-	-
				-	-
Total Host Contributions	\$ -	\$ -	\$ -		\$ - #DIV/0!
2. International Rotary Clubs/Districts					
		\$ -	\$ -	\$ -	\$ -
				-	-
				-	-
				-	-
				-	-
				-	-
				-	-
				-	-
Total International Contributions	\$ -	\$ -	\$ -		\$ - #DIV/0! ¹
	\$ -	\$ -	\$ -	Total Rotarian Contributions	\$ - 100% ²
3. TRF World Fund match (80% of DDF)	\$ -			World Fund match	- ²
4. Endowed/Directed Gift #				(5% NA)	-
5. TRF Donor Advised Fund				(5% NA)	-
				Total Global Grant Funding	\$ - ³
6. Other donors (unmatched)					
		\$ -	\$ -	\$ -	
			-	-	
		-	-	-	- ⁴
Total Project Funding (must be equal to budget)					\$ -

Ensure that all figures are whole numbers

¹ Contributions from the international partner must be a minimum of 15%.

² (80% of DDF, 0% of Cash) There is no minimum World Fund match. Maximum World Fund match is \$400,000.

³ Total funding must be at least \$30,000

⁴ Please identify the source(s) of other funding.

Non-Rotarian contributions may not come from a cooperating organization or a beneficiary of the project.

Contributions from individual Rotarians should be entered in the application under the Club's name.

Public Image

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:

- Explore how my club can benefit from a Public Image Strategy
- Identify my club's target audience and how we can effectively reach them
- Relate the goals of Public Image in the Rotary club to the Strategic areas in the Rotary International Action Plan
- Learn how to apply the "Rotary Brand" to the benefit of my club

Resources:

- Rotary Action Plan
- Rotary Logos & promotions – Rotary Brand Center
- Rotary Learning Center – Club Public Image Committee Basics

Session Topics:

1. What is the difference between Publicity, Public Relations, and Public Image? Which one might we have more control over?
2. What does Public Image mean for a club? For Rotary?
3. Is there something about your club that the community recognizes? Is it different from the brand of Rotary International? What is the Rotary Brand?
4. Does your club have a PI Chair? Do you need one? Why? What do they do?

From the Club Public Relations Committee Manual (no longer available in print):

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

5. What does this list tell us about and what is important to our club? What is the most important?
6. Who is the club's target audience?
7. How should we be talking to them?
8. Exercise!

Summary:

- The club's public image can affect the credibility of the club, as well as your membership.
- Publicity is more than just press releases.
- A wealth of resources is available from Rotary International.

Public Image Case Study

Read the following case study and create a public image 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 community. The club's weekly program attracts prominent local speakers, and members are enthusiastic about their work in the community.

The club provides support for the community's growing older population. Through this ongoing project, club members prepare and deliver meals, arrange for home repairs, and visit residents who have been admitted to the hospital.

The club also helps to identify candidates for a Rotary Peace Fellowship. 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.

Despite all their good works in the community, a survey indicated 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. This image of the club has made it difficult to attract new, younger, and diverse participants.

1. Verbalize the problem.
2. What aspects of the club's current activities might interest the media?
3. Which type of media is most appropriate for each aspect? Why?
4. How might regular club programs be of interest to local media?
5. Other than Public Image, what other committees should be involved in solving this problem?
6. Many people would say this problem is in the hands of ALL members of the club. What could EVERY club member do to solve the problem? How can the Public Image Committee help in this regard?

Public Relations Writing

Strong, clear, and concise writing is essential in public relations. Effective PR writing captures the reader's attention, delivers key information quickly, and encourages media interest in 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*

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

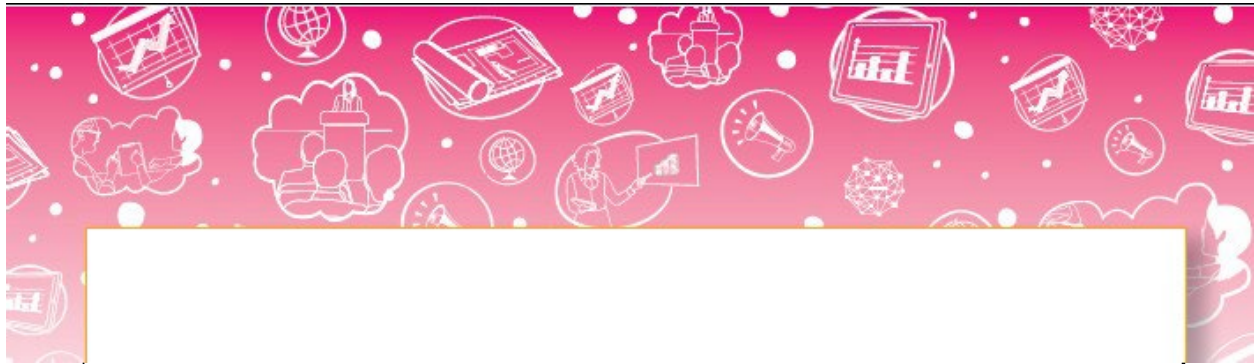
- Grow and diversify our membership and participation
- Create new ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

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



ROTARY'S CORE VALUES

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

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

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

4410-EN—(220)

Building A Stronger Club

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

Resources:

- Be a Vibrant Club

Session Topics:

1. Review the document, How Expectations Might Differ, with the group.
2. How do the Five Avenues of Service work with expectations?
3. How might Service projects meet member expectations?
4. What do the members in your club expect? What about prospective members?
5. Exercise!

6. Lead a question-and-answer session so participants can ask each other about the ideas presented.

Summary:

- Strong Clubs are a result of planning and implementation.

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.

IDEAS TO PERK UP CLUB MEETINGS AND EVENTS

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

Meeting in small groups on a regular basis (similar to the first meetings of Rotary) with a focus on one of the following – Rotary Learning, getting to know one another, committee planning....

Vary the format of club meetings. There are numerous ways in which this can be accomplished including:

- Have family members run a meeting;
- Invite someone from another club to speak to your club about how they have successfully employed different meeting formats
- Link with Rotaractors and Interactors to conduct a mutually-planned meeting
- Invite “lost members” to a meeting
- Invite back all past-presidents who have left the club (for whatever reason)
- Meet at a different time or location
- Have a Vocational minute (or five minutes) 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” to meet all members and guests upon arrival
- Invite all local organizations who have benefitted from the club’s activities to attend a “celebration” meeting, once a year.

How Expectations Might Differ

Traditionalists

Born before the Baby Boom (before 1946)

- Silent Generation ... Veterans... some “survivors”
- Appreciate patriotism, teamwork
- Do “more with less”
- More formal dress and expectations of this from others
- Arrive early at meetings
- Assist with the “setup” where appropriate
- Expect a formal (and often written) agenda for the meeting

Baby Boomers Born between 1946 – 1964

- Economically and politically influential in the 2020’s and therefore enjoy products and services that make life easier
- Confident, self-assured
- Less formal attire for meetings
- Quite adaptive in terms of meeting times – not hindered by long meetings
- Expect a meeting with lots of visual stimuli (e.g. Powerpoint presentations)
- Strong work ethic carries over to club progress and projects

Generation X

Born 1965 – 1976

- More concerned about “balance” between work, volunteerism, family
- Structured time for meetings to accommodate the balance ... if meeting or project is supposed to take X amount of time, Gen X’rs want to leave at that time.
- Resourceful and independent thinkers based on having to deal with many economic challenges; often can seem rebellious
- Can be less tolerant of traditionalists in club meetings
- Technological pioneers whose skills and adaptability are there if the club can manage them.

Millennials

Born 1977 – 1997

- Well-educated and focused on addressing large societal needs rather than individual ones.
- Females outperform males for the first time.
- Value collaboration and expect the same from others.
- Want meetings to have a clear purpose, not just held out of habit.

Generation Z

Born after 1997

- Technologically savvy – Often referred to as the "smartphone generation," they have a positive attitude toward tech-based activities.
- Well-educated – Focus on addressing societal needs over individual gains.
- Emerging Leaders – Just beginning to engage with Rotary, often through Rotaract.
- Diversity and Inclusion – They value diversity and expect it in organizations they join.
- Collaboration and Purpose – Willing and able to work collaboratively and seek clear purpose in meetings and activities.
- Flexible and Practical – Prioritize flexibility in both workplaces and Rotary meetings.
- Adventure and Savings – Love to travel but are also money-driven and focused on saving.
- Boundary Setters – Good at setting boundaries for work, volunteerism, and personal life.

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:

- Apply the knowledge and skills acquired in the Rotary Leadership Institute to a specific situation in my club
- Share action plans developed to deal with a specific situation in my club with other attendees
- Understand the basics of implementation – awareness, understanding, behavioral change / advocacy, and the importance of not moving too quickly through the understanding phase
- Provide feedback to the Rotary Leadership Institute team on specific elements of the program
- Celebrate!

Session Topics:

1. What RLI Sessions were most memorable to you individually, and why?
2. Is RLI making a difference? For you? For your club?
3. What sessions worked the best? Why?
4. What ones should be improved? How?
5. What one thing would you change about RLI?
6. Were there any topics you expected to learn about in RLI that were not covered?
7. Has RLI made a difference in your Rotary club? If not, why, and what can we do differently?
8. 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?
9. What burning question do you still have about Rotary that you want to know?

10. Exercise! Let's put all of this knowledge to work!

RLI Core Courses

	RLI Curriculum
Part I	My Leadership In Rotary My Rotary World Ethics and Vocational Service Foundation I: Our Foundation Engaging Members Creating Service Projects
Part II	Rotary Opportunities Effective Leadership: Coalition Building Attracting Members Club Communication Team Building Foundation II: Targeted Service
Part III	Planning for Success: Strategic Planning The Rotary Foundation: International Service Public Image Building a Stronger Club Making a Difference

My RLI Personal Action Plan

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

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: _____