

A Joint Project of over 400 Rotary Districts worldwide

2018-22

FACULTY—PART III

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

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

The RLI Curriculum Committee. RLI has determined to also hold Curriculum Committee meetings in various parts of the world. The current plan is to meet in the United States in two of each three year period and at one or two various international sites each Rotary year. All RLI Divisions will be given notice of such meetings with a request that RLI Divisions, member Districts/Clubs be requested to send their comments/suggestions to the International RLI officers. Building on actual RLI experiences around the world will enhance the value of RLI courses. **Any RLI Division may send representative(s) to any curriculum committee meeting at any location.**

2018-2022 RLI Curriculum Committee

RLI Part III – MY ROTARY JOURNEY

TABLE OF CONTENTS

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

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

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

Material in bold is for Faculty use and is not included in Participant guides.

COURSE MATERIALS

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



Strategic Planning

4

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



Foundation III: International Service

17

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



Public Image & Public Relations

21

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

25

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



Making a Difference

29

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

Course Evaluation

Handout

Strategic Planning



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

Session Goals

Understand the Value and Process for Strategic Planning

Analyze Your Rotary Club

Review Possible Areas of Improvement

Discuss How Specific Improvements Should be Made

Materials

◆ □ SPA-1: Strategic Planning Guide. *EN (109)*

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

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

Key: ◆ attached insert ● online □ article

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

Session Topics

The focus is not to detail it in full but rather to highlight the three pillars.

1. Rotary International suggests that clubs develop strategic plans. What is a strategic plan? Why do we need one? What are the benefits?

There are many ways to do strategic planning, and some of your club members may have experience with a particular process.. "Visioning". How can you discover and use this expertise? Are there other people resources you can call on for assistance?

2. Based on your previous group Self-Evaluation result "areas of improvement", develop at least two three-year goals and an annual goal for each one. What strategy are you going to use to accomplish each goal? How can you insure accountability?

Note: Use same small groups established in the Club Analysis section.

3. What is the process of creating a strategic plan? Is board, club, or key member "buy-in" more important? How often does the plan need to be reviewed? Can the plan be changed? How?

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

7. Complete the survey as directed.

Instructions to Facilitator:

- a. *It is suggested that class be divided into small groups.*
- b. *Have each group complete one section of the survey:*
 - Club Administration*
 - Membership*
 - The Rotary Foundation*
 - Structured Programs / Public Image*
- c. *When completing Club Evaluation Survey in the session, the points do not apply. If participant does not know the answer, assign "DK – Don't Know".*
- d. *Advise participants to not add points in each section.*
- e. *Do not assign the bonus questions.*

"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

8. What was your reaction to the survey?

Discuss within the entire group. Ask participants to briefly explain their reaction and suggestions for improvement. What are you going to do in your club.

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

Each group suggests improvements for the area of the survey they completed.

Insert SPA-1 (3 pages)

Strategic Planning Guide

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

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

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

Strategic Planning Worksheet

1. Where are you now?

List the opportunities and challenges facing your community.

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

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

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

3. How do you get there?

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

Strategic priority 1: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 2: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 3: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

4. How are you doing?

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

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

Insert SPA-2 (8 pages)

Rotary Club Self-Evaluation of Performance and Operations

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

Club Administration

Score

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

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

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

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

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

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

Please assign points for the following:

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

Please add the totals points for questions 1-47

Club Administration _____

Don't knows _____

Membership

Score _____

Please assign points for the following:

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

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

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

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

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

Please add the total points for questions 1-33 Membership _____
Don't knows _____

The Rotary Foundation

Score

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

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

Please assign points for the following:

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

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

Service Projects

Score

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

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

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

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

- Drug use prevention or rehabilitation
 - Polio eradication or other community immunization project
 - Environmental activities.....
 - Literacy projects.....
 - Clean water programs
 - Providing food for the hungry
 - Assisting the community’s handicapped or elderly
 - Providing health or medical care locally or Internationally.....
 - Providing recreational opportunities for the community.....
 - Helping the poor or needy of the community
 - Improving the community’s economic or social quality of life.....
 - Conducting career opportunity programs.....
 - Assisting or guiding the youth of the community
 - Creating or supporting a Rotaract or Interact Club
 - Working with other local service groups on a common project.....
 - Work with other Rotary Clubs on a common project.....
 - Work with community educational facilities
 - Traffic or highway safety programs or projects
 - Animal safety or care programs
 - Disaster assistance program or project.....
 - Others
- Total points for question 10.....

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

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

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

Please add the total points for questions 1-23

Service Projects _____

Don't knows _____

Rotary Publicity & Public Relations

Score _____

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

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

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

Please add the total points for questions 1-11

Rotary Public Relations _____

Don't knows _____

Bonus Questions

Score _____

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

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

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

Totals

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

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

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

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

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

A copy of this survey for duplication is available at www.RLI33.org under the "Downloads" section.

Foundation III: International Service



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

Session Goals

Learn about opportunities for international service

Utilize our vocational skills on international projects

Learn how Rotarian Action Groups broaden our service

Explore ideas for international service

Inserts & Online Materials

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

Key: ◆ attached insert ● online □ article

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

Session Topics

- 1) What is International Service?
Discuss needs, goals, of specific projects. Personalize the project to your club members where possible.
- 2) A Rotarian while traveling internationally visited a club and became interested in helping with a problem in the community she was visiting. After obtaining the local Rotary club's commitment to address that problem, how should the Rotarian (and the local club) proceed to bring the project to fruition?
Facilitators should review the TRF brochure "Lead Your Club: Service Projects Committee" found on the RI web site for guidance in leading this discussion. In particular, see pages 5–6 of that publication for steps in planning a service project.

3) International service can be **with** Rotary Foundation support or **without** Rotary Foundation support. Discuss the advantages of each.

7) How can we utilize our vocational skills in international service?
By volunteering to help organize or work on a project using our unique vocational skills, by volunteering with a Rotarian Action Group that makes use of skills or talents that we have. A list of Rotarian Action Groups can be found on Rotary Opportunities RO-3. Refer to Vocational Training Teams.

8) Global Grant Exercise—The class will engage in the process of creating an international Global Grant project, including the funding flow.

Preparations by the Discussion Leader ahead of time:

- ***Prepare description of the host and sponsor clubs, one for each member.***
- ***Global Grants Process sheet (from the RI web site)***
- ***Pre-printed “cash” (may use colored index cards, etc.) Suggest \$10,000 for each of the host and sponsor clubs.***

Explain to class that they will be creating an International Project. Split the class into two—one to be the host club and one the sponsor club(s). Have the host create a project and discuss it with the sponsor. Each group to internally discuss their roles, interacting with the other as required. Allow 10 to 15 minutes.

Have each group report to the class about the project and what they did.

At the end, have one person from each group come to the board and fill-in a giving matrix that would include the following and the matching funds for each category:

Host: • Club \$\$
 • District \$\$

Sponsor: • Club \$\$
 • District \$\$

Third Party and individual donations: \$\$
Minus TRF 5% administrative fees

Emphasize how the “Rotary math” can multiply the funds available and what can be accomplished.

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

International Service Projects aim to:

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

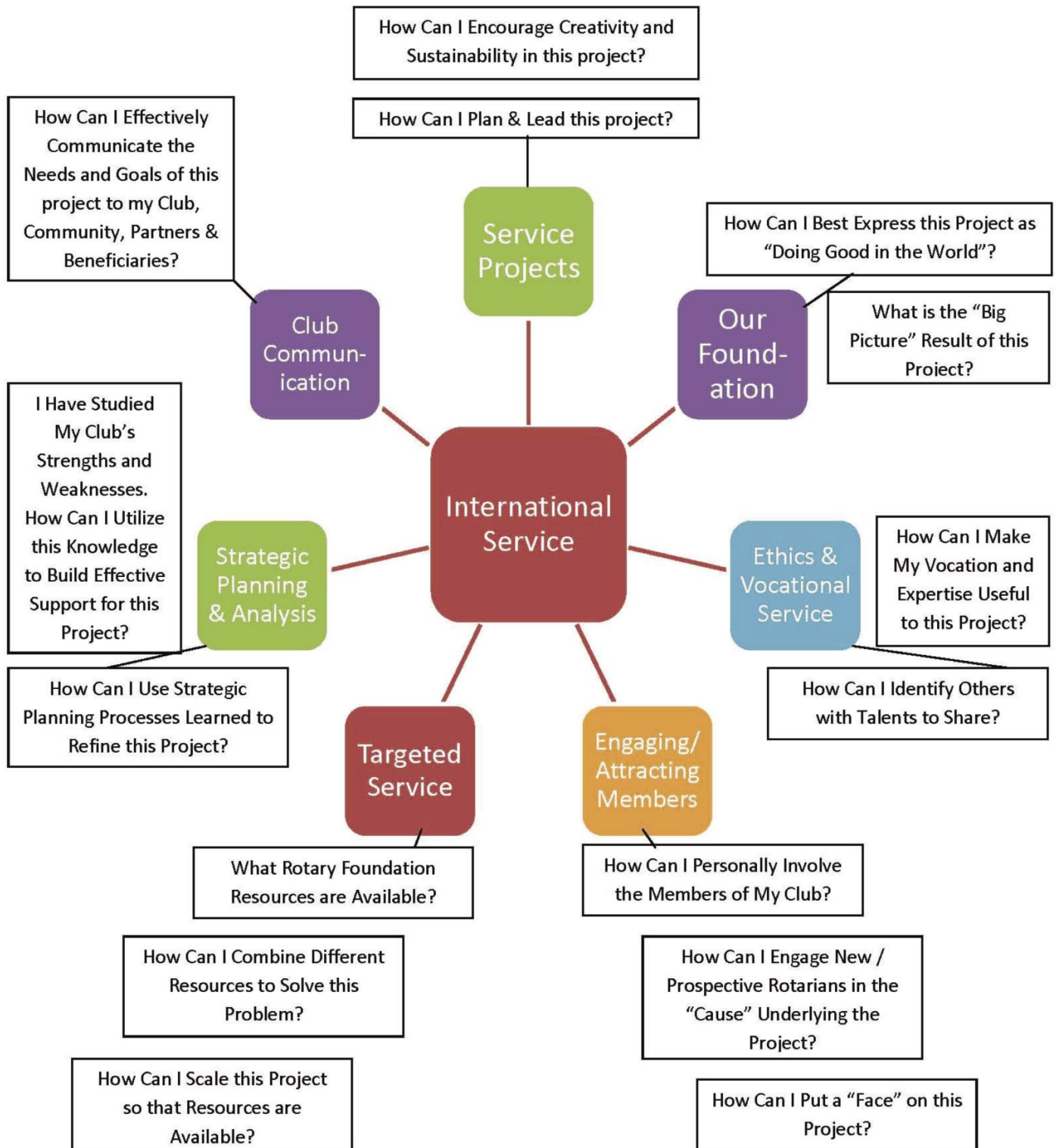
Global Grant projects must adhere to specific criteria.
Visit the Grant Center at www.rotary.org.

Getting Involved

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

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

Insert IS-2: Bringing It Together in International Service



Public Image and Public Relations



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

Session Goals

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

Explore how my club can benefit from a Public Relations Strategy

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

Inserts & Online Materials

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

Key: ◆ attached insert ● online □ article

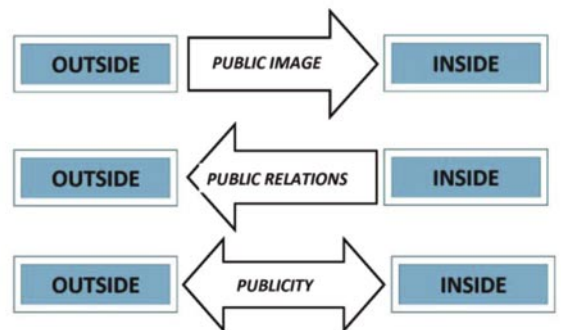
Session Topics

1) Who is the club's target Audience?

It depends on what the club is doing and what it wants to accomplish.

2) What is the difference between Publicity, Public Relations, and Public Image? Which one might we have more control over?

- *There are many definitions of and distinctions made between these terms, and the discussion should be based on the business experience in the group.*
- *One set of definitions from MacMillan Dictionary, "Publicity" is the activity of creating a good opinion among people about a person, product, company or institution, or information that makes people notice a person, product, company or institution.*
- *"Public Relations" is the relationship between an organization and the public.*
- *"Public Image" is the concept that the ideas and opinions that the public may have about a person or an organization may not be what they really are.*



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

Flip chart ideas:

- ***Newspaper***
- ***Internet – Many options***
- ***Television***
- ***Radio***
- ***Billboards***
- ***Club Brochure***
- ***Fundraiser***
- ***Feature Article***

4) Case Study PIPR-1

- ***Divide into 2 groups: Internal (members) and External (public) target audiences.***
- ***Have each group note on a flip chart specific Public Relations ideas and methods of communication for their audience, based on the Case Study.***
- ***Groups should include types of media to be employed and the essence of each message.***
- ***See PIPR-1 for follow-up questions***

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

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

Examples:

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

7) Does your club have a PR chairman? What is their role? Is there a PR strategy? Are projects and activities designed with PR in mind? How can club members be part of the PR strategy?

From The Club Public Relations Committee Manual, 226C-EN- (512)

- ***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.***

Insert PIPR-1: Public Relations Case Study

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

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

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

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

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

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

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

Insert PIPR-2: Public Relations Writing

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

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

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

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

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

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

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

Excerpted from www.Rotary.org

Building A Stronger Club



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

Session Goals

Examine the varying expectations of Rotary

Explore the consequences of met and unmet expectations

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

Materials

◆ ● Insert BSC-1: Guiding Principles of Rotary

◆ □ Insert BSC-2: Expectation & Delivery Exercise

◆ ● Be a Vibrant Club 245-EN (111)
<https://my.rotary.org/en/document/be-vibrant-club-your-club-leadership-plan-presentation>

Key: ◆ attached insert ● online □ article

Things to Think About

1) What is meant by Rotary's promise? Discuss?

Does your Rotary club set expectations with its target audience about membership in the club? How? Does this differ for current members and prospective members? Does it differ based on age, position in the workforce or retirement status? Does it differ by constituencies or groups within and outside the club?

2) What types of specific or general expectations are set, if any, in your club? discuss this issue for one of the groups identified in the prior question and complete the Expectation and Delivery Exercise.

3) Consider how your club might meet these expectations through each of the five Avenues of Service. What is my role in doing this?

Insert BSC-1: Guiding Principles of Rotary

Guiding principles

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

Object of Rotary

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

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

The Four-Way Test

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

Of the things we think, say or do

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

Avenues of Service

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

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

Making a Difference



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

Session Goals

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

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

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

Materials

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

Key: ◆ attached insert ● online □ article

Session Topics

General discussion or discussion in small groups may be most appropriate given your class size for Session Topics 1-9. It may be advantageous for small groups to be given one or more specific questions and then to report back to the group on their findings.

Refer to Inserts MD-1 and MD-2 as a reminder to your class of the courses they took in Parts I, II and III and how they relate together. Even though their course titles and some goals and materials may have changed over time, the essence of the experience should be similar.

Specific recommendations should be made in a way that can be preserved and reviewed by appropriate RLI staff.

- 1) What RLI Sessions were most memorable to you individually, and why?

- 2) Has RLI made a difference in your Rotary club? If not, why, and what can be done to change things so that RLI is making a difference in your club?

- 3) What are some of the issues facing Rotary and your club that can be improved through the use of ideas, skills or techniques used in RLI?

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

5) Is RLI making a difference?

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

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

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

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

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

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

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

*—Past RI Director & RLI Founder
David Linett*

Pull up a chair in the middle of the "U", eye level with participants. I am your club president—I have never attended RLI—convince me why I should go.

10) Complete the Personal Action Plan.

See Insert MD-3. Allow 5-7 minutes minimum for completion of the Plan.

The Personal Action Plan should allow the participant to narrow their focus to a personal or club oriented change with some specific action steps, all meeting the SMART analysis (or a similar goal analysis technique appropriate for your community or culture).

Faculty should consider methods of both reinforcing the commitment of this goal and allowing review by RLI staff. Suggestions include: (1) making a duplicate copy, one for student and retain the other; (2) reinforcing the commitment before the group; (3) assigning Participants to follow up with each other in assigned pairs at specific times; or (4) use appropriate technology to get the pairs or the group together to discuss their progress, such as phone, conferencing, web meeting, etc.

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

Insert MD-1: RLI Undergraduate 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	Strategic Planning Attracting Members Club Communication Team Building Foundation II: Targeted Service
Part III	Rotary Opportunities Effective Leadership Strategies Foundation III: International Service Public Image & Public Relations Building A Stronger Club Making a Difference

Insert MD-2: My RLI Personal Action Plan

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

SMART Objective: _____

S pecific _____

M easurable _____

A chievable/Agreed to _____

R ealistic/Result-oriented _____

T ime-framed (goal attainment date) _____

Action Steps to take to achieve this goal:

1. _____

2. _____

3. _____

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

Additional Training or Knowledge I may need: _____

How I plan to celebrate my success! _____

Signed: _____ Date: _____