



Rotary Leadership Institute

Heart of America Division

Serving RI Zones 30 & 31

Annual Report

For the 2023-2024 Year

***Strengthening Rotary clubs through
quality leadership education!***

Recap of the 2023-2024 Year in RLI-HOA

Comments by Tom Greene, Chair during 2022-2024

At the core of our work in RLI is conducting three individual Parts, additional graduate topics and facilitator training. The education that the students receive using these opportunities prepares them for leadership roles in the clubs and districts. We felt this mission strongly during COVID and developed approaches that supported distance learning online rather than only in person. Since COVID the number of sessions has continued to increase each year using both methods. You will find a summary by district in this report.

We implemented a new communications tool that aids the districts and division to make the scheduled sessions available to everyone through our District and Club communications database (DAC) and website. It also provides continuity of information with a change in assignments each year in the districts and division. The tools in the system make the work of the coordinators easier to do as well.

The lesson plans for the three sessions were updated and upgraded in the last year by RLI International. We continue to work with RLI International to improve the product to make it more relevant for the student leaders.

There are many byproducts for the districts by using RLI as a part of leadership development. A ready access list of facilitators in other training is available in each district database. Graduate Rotarians and Rotaractors that are prepared to serve in the district are also available in each district's database. Future district governors are often found in the district coordinators. The dedication of the district coordinators and facilitators allows each district to focus on its needs by scheduling and conducting the sessions in person or online when it best fits the needs.

The division is putting attention on sharing what we do through Zone meetings, newsletters and routine communications to further the work of RLI in the districts.

Our work continues

The 2023-2024 year was busy for the HOA Division

Several areas of focus were pursued: (1) increase in the number of RLI sessions conducted, (2) continued assistance and instruction on using the registration system by District Coordinators, (3) adoption of the newest RLI Course Material and (4) enhanced communications with RLI District leadership.

(1) Increase in the number of RLI sessions:

The all-volunteer board focused on continued expansion of the number of RLI sessions conducted in the HOA Division.

After offering approximately 550 RLI sessions in 2022-2023, a goal of 600 sessions was set for 2023-24. That goal was surpassed.

During the July 2024 Board meeting, JD Rottero reported that the Division conducted 614 different RLI sessions for Rotarians. Performance details are shown in the right-hand column.

(2) Continued instruction on using the registration system:

A Zoom session was held to help District Coordinators learn the nuances of the registration system. JD Rottero, RLI-HOA Registrar, answered questions and shared information about registering, closing, and posting of completed classes. JD demonstrated a new manual that provides guidance on registration and closing of classes. It can be found in the resource section of the web page: www.rlihoa.org.

Number of RLI Sessions	Sessions conducted for the year: 2023-24
District	Sessions: Part I, II, III & facilitator
6040	74
6060	0
6080	0
6150	0
6190	29
6200	45
6460	0
6490	35
6510	13
6560	0
6580	19
6600	16
6670	45
6690	0
6710	0
6740	53
6760	90
6780	92
6800	0
6820	22
6840	0
6860	81
6880	0
Total	614

(3) Adoption of new RLI Course Materials:

During the year, new course material from RLI International was introduced. RLI-HOA Chair of the Curriculum Committee, Elizabeth Usovicz, presented an informative session about the new curriculum. Districts should implement the new curriculum as they schedule RLI sessions.

(4) Communications with District Leaders:

During this last year, the Board took action to host Zoom calls to address District leaders' concerns. Discussions of topics such as registration, opening and closing of RLI sessions, facilitator preparation, and implementing the new curriculum were held.

January 2024 Election Results:

In January, the HOA-RLI-Member District Governors, HOA-RLI District Coordinators, and HOA-RLI board members cast votes for positions on the Board beginning July 1, 2024.

New Officers for 2024-2026 are:

Registrar - JD Rottero (D6760), reelection

Vice Chair – Jerome Bannister (D6760), newly elected

Newly elected Regional Coordinators: (*designates home District)

Pat Cross, (D6860) newly elected, to serve D6780/6800/6860/6880

Pam Stewart (D6190), reelection, to serve D-6190/6200/6840/6820

David McCaughey (D6040), newly elected, to serve D-6040/6060/6080/6150

The individuals above will join existing officers and regional coordinators who are mid-term:

Current Officers (and their expiration terms.)

Chair – Jeff Romine (D6040) **June 30, 2026**

Secretary -Linda Thomas (D6190), **June 30, 2025**

Treasurer – Frank Bradshaw (D6200), **June 30, 2025**

Regional Coordinators for the term July 1, 2023-June 30, 2025

Cindy Guthrie, currently serving D-6460/6490*/6510

Bill Shula, currently serving D-6600/6630/6650/6670/6690

Dean Hammond, currently serving D-6710/6740*/6540/6560/6580

RLI-HOA Financial Statements as of June 30, 2024

RLI-Heart of America Division	
Income Statement	
July 01, 2023 through June 30, 2024	
ORDINARY INCOME/EXPENSE	
INCOME ACCOUNTS	
District Member Dues	\$ 2,300
Registration Income	\$ 34,709
Interest Income	\$ 616
Total INCOME ACCOUNTS	\$ 37,565
EXPENSE ACCOUNTS	
RLI Sessions	
RLI Workbooks/Materials/Office 360	\$ 1,722
Reimb - Travel - Milage	\$ 482
RLI Workbooks/Materials-Mailing Station Inc	\$ 1,991
Reimb - Travel - Lodging	\$ 875
Reimb - On Site - Food/Beverage	\$ 13,335
Reimb - On Site - Rentals	\$ 1,220
Reimb - On Site - Supplies	\$ 946
Reimb - On-Site - Printing/Postage	\$ 2,196
Credit Card Fees	\$ 712
Total RLI Sessions	\$ 23,479
DACdb Expenses	
DACdb - Registration Fee	\$ 1,689
DACdb - WordPress Website	\$ 595
DACdb - Finance Module	\$ 249
DACdb - Domain Name Registration	\$ 35
Total DACdb Expenses	\$ 2,568
RLI International Dues	\$ 2,000
Bank Fees	\$ 32
RI Zones 30/31 Institute	\$ 457
Total EXPENSE ACCOUNTS	\$ 28,535
NET INCOME	\$ 9,090

RLI – Heart of America Division	
Balance Sheet, As Of June 30, 2024	
ASSET ACCOUNTS	
JD Bank (Checking Acct)	\$ 17,711
Academy Bank CD (xxx2315)	5,411
Academy Bank CD (xxx2307)	5,411
Academy Bank CD (xxx2331)	5,574
Academy Bank CD (xxx2323)	5,574
Receivables	4,740
Total ASSET ACCOUNTS	\$ 44,421
LIABILITY ACCOUNTS	
Total LIABILITY ACCOUNTS	\$ 0
EQUITY ACCOUNTS	
RLI/HOA Retained Earnings	35,332
NET INCOME	9,090
Total EQUITY ACCOUNTS	\$ 44,421
Total LIABILITIES & EQUITY	\$ 44,421

Plans for the 2024-2025 Year

Comments by Jeff Romine, Chair during 2024-2026

July 1, 2024, marked the change in leadership of RLI-HOA, with a new Chair and members of the Board assuming positions. Jeff Romine, PDG from D6040, assumed the reins as Chair, handed to him by Tom Greene. Tom's leadership during the last two years, and all prior leaders of RLI-HOA, have positioned the Division well. The recent adoption of a new Information System has made it possible to relieve the record-keeping burden on our District Coordinators, and has made improvements possible in the promotion, registration, opening, and closing of RLI sessions. It is now quite easy to provide a list of RLI graduates to District leaders when they are in the process of forming committees and identifying District leaders.

Building on the efforts and leadership of the past, Chairman Romine has indicated that he would like to see the Board and Committees focus on these initiatives: (1) Increase and improve support of our District Coordinators, (2) Expand the Zone-wide Rotarian awareness of RLI-HOA, (3) Continue to focus on maintaining a strong curriculum, and (4) Strengthen our connections with Zone Districts that are not Heart of America Division members. Romine is optimistic that with help from the Board and Committees, RLI-HOA can reach more Rotarians.

Chairman Romine added that he is both proud and honored for the privilege of serving in the RLI – HOA Division leadership. The educational sessions that are provided are quite helpful to Rotarians who are trying to make a difference. The background and insights gained from the RLI sessions can be used to assist Rotarians to design successful Rotary careers. It is the who register for our sessions, the District Coordinators who make those sessions happen, and the Facilitators who lead those sessions that are the most important individuals in our organization. The role of HOA leadership is to encourage and support those Rotarians.