

Find Your Passion in Rotary



Mid-Atlantic RLI

MD • DE • DC • WV • TN • VA • NC • SC

A Joint Project of over 410 of Rotary's 535 Districts worldwide

2024-2025 Participant Materials

PART II



Mid-Atlantic RLI

MD • DE • DC • WV • TN • VA • NC • SC

Division History

Rotary Leadership Institute courses were first offered within the boundaries of Zone 33 in Rotary District 7570 (Western part of Virginia, Eastern Tennessee) in 1997. In 2004, Rotary International Director Ken Morgan appointed representatives to an Executive Committee to establish an RLI presence across the Zone. Led by future Rotary International Vice-President Eric Adamson of Virginia as Executive Committee Chair, the committee of PDG Ken Tillman of Virginia, PDG Jack Porter of West Virginia, PDG Bevin Wall of North Carolina and PDG Sue Poss of South Carolina, and the 2004-05 Governors of each district, established RLI as a multi-district project of all 13 then-Zone 33 Rotary districts, Nos. 7530, 7550, 7570, 7600, 7610, 7670, 7680, 7690, 7710, 7720, 7730, 7750 and 7770. It became the second division established of The Rotary Leadership Institute, after the "Home Division" in the northeast United States. District 7030 in the Southern Caribbean was in the Division from 2005-2013. Districts 7620 & 7630 DC/MD/DE joined after the 2009 Zone expansion. A Board structure was adopted in 2005, with the Institute being led by Chairs Adamson, Wall, PDG Sandra Duckworth, PDG Abe Clymer, PDG Jayne Sullivan, PDG Michael Ellington, and PDG Leigh Hudson. In 2011, a Staff-Policy Board structure was adopted, and Bevin Wall was appointed RLI Executive Director. On his retirement in 2019, there was a return to a Board governance model.

2024-2025 Leadership (all-volunteer)

Mid-Atlantic RLI Board of Directors. Sean Jeffrey Sawyer (Chair), See: <https://www.midatlanticrli.org/board-of-directors/>

Regional Coordinators.

South Carolina Region (Districts 7750, 7770): Rod Funderburk,
North Carolina East Region (Districts 7710, 7720, 7730): Robert Richey
North Carolina West Region (Districts 7670, 7680, 7690): Allison Burkett
Chesapeake Region (Districts 7600, 7610, 7620, 7630): Roger Harrell
Mountain-Valley Region (Districts 7545, 7570): Craig F. Stout

District Chairs <https://www.midatlanticrli.org/district-rli-chairs-committee-members/>

RLI Faculty & Staff. Many dedicated Rotarians make RLI work. View the RLI Page at www.midatlanticrli.org for additional information.

RLI Part II – THE CLUB

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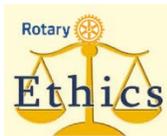
The Rotary Leadership Institute (RLI) is a grass roots, multi-district leadership and Rotary development program using facilitation and activity-based learning in a small group setting to engage Rotary members and strengthen clubs.

RLI is not an official program of Rotary International and is not under its control.

Our Mission: To help Rotary members find their **Passion through Rotary**, and to engage them to make their clubs stronger.

COURSE MATERIALS

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



Rotary & Ethics

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I am ethical, recognize and promote ethics in others, and seek opportunities to serve through my vocation



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Attracting Members

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I can lead and promote my club's reexamination of its distinctive position in my community and the quality of members we attract. I want to work with the best people!

Coming Attractions

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Course Evaluation

Handout



Rotary & Ethics

Session Goals

How should the Guiding Principles of Rotary strengthen me in my vocation?

How can I promote Rotary and Rotary ideals within my vocation?

Materials

Insert RE-1: Good to Know for Rotary & Ethics

Insert RE-2: Guiding Principles of Rotary

Insert RE-3: Vocational Service Ideas

This is a course in the Rotary Membership Spiral going across the three days of RLI. Prior courses include My Club & Beyond and Engaging Members. Other courses in this section include Attracting Members. Additional courses building on this session include Club Communications. Leadership and Service have separate spirals.

Session Topics

1) Ethical Issues Faced by Clubs

Rotary clubs and members are often faced with ethical situations which affect the entire club and can well spread into the community at large. These issues have a way of mushrooming to the extent that may impact the financial health of the club, membership, and overall reputation of the club and its members.

The following issues will be addressed in small groups:

- a. Misuse of Club Funds
- b. Creating a Satellite Club
- c. Changing the Name of the Club

“Example- good or bad- is contagious...”

If we set a good example, seeing us, others may do likewise.

All of us have more influence than we sometime suppose.”

1966-67 RI Pres. Richard L. Evans
— The Appearance of Things
THE ROTARIAN, May 1967



Each small group will explore the following:

- i. Identify the Issues

- ii. Determine what considerations need to be addressed

- iii. Develop an action plan.

2) Review Insert RE-2: Guiding Principles of Rotary.

a. 4 Way Test

- i. Would using the 4 Way Test change any of the recommendations?

- ii. What ethical issues were raised in your small group discussions?

b. Rotary Code of Conduct

- i. Discuss and determine how the Rotary Code of Conduct applies to the issues discussed in your small group.

- ii. Is the Rotary Code of Conduct relevant to your work or civic challenges today?

3) What kind of vocational service activities could be done in your club to promote Rotary Ideals and Ethics?



Insert RE-1: Good to Know for Rotary & Ethics

- Ethics can be defined as (1) a set of moral principles, a theory or system of moral values, (2) the principles of conduct governing an individual or a group, or (3) a guiding philosophy. From Merriam-Webster.com
- Rotary was not born in Chicago in the early part of the twentieth century because the city was awash in goodwill and concern for others. Quite the opposite was true. The concept of “business ethics” in Chicago at the time was considered an oxymoron. The principles of Rotary were a reaction to the unethical business climate of the era.
- Rotary founder, Paul Harris, believed that standing for ethical behavior in business and professions set Rotary apart from every other social club of the era.
- Although Paul Harris founded Rotary, many other people put their mark on Rotary in those early years, including fellow Chicagoan, Arthur Sheldon.
- Harris devoted an entire chapter of his second book to Sheldon, who moved to Chicago after graduating from college, but found himself appalled by the business ethics that dominated Chicago, or rather lack of business ethics. He abruptly quit a decent job because of the unethical things his employer expected of him.
- Sheldon argued that, not only can ethical businesspeople survive in a community filled with unethical businesses, but they can prosper. Given a choice, people will always choose someone that they can trust. Advocated by Harris, this principle quickly became a core element in Rotary philosophy and remains so today.
- As Rotary developed, early Rotary leaders tried to balance guiding principles that did not always agree. Rotary was originally conceived as a service organization that brought businesspeople and professionals together to improve their community through club actions and through a shared commitment to ethical conduct in all aspects of their lives. All community leaders who adhered to these values were welcome, regardless of their religion.
- To create a harmonious environment for the fellowship that held clubs together, Rotary discouraged religious and political positions. However, the commitment to ethical conduct is a commitment to “the golden rule,” which is a universal religious principle.
- By the 1930’s Paul Harris worried that the golden rule needed to be abandoned by Rotary to avoid religious overtones but doing so would deny a core value of Rotary. The solution was the Four-Way Test.

Note: The preceding reprinted from The Rotary Global History Fellowship website.



Insert RE-2: Guiding Principles of Rotary

The Object of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and 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 Five Avenues of Service

Based on the Object of Rotary, Rotary's Philosophical cornerstone and foundation of a club's activities:

Club Service focuses on strengthening fellowship and ensuring the effective functioning of the club.

Vocational Service encourages Rotarians to serve others through their vocations and to practice high ethical standards.

Community Service covers the projects and activities the club undertakes to improve life in its community.

International Service encompasses actions taken to expand Rotary's humanitarian reach around the globe and to promote world understanding and peace.

Youth Service recognizes the positive change by youth & young adults via leadership and involvement.

The Four-Way Test

From the earliest days of the organization, Rotarians were concerned with promoting high ethical standards in their professional lives. One of the world's most widely printed and quoted statements of business ethics is The Four-Way Test, which was created in 1932 by Rotarian Herbert J. Taylor (who later served as RI president) when he was asked to take charge of a company that was facing bankruptcy.

This 24-word test for employees to follow in their business and professional lives became the guide for sales, production, advertising, and all relations with dealers and customers, and the survival of the company is credited to this simple philosophy. Adopted by Rotary in 1943, The Four-Way Test has been translated into more than a hundred languages and published in thousands of ways. It asks the following four questions:

"Of the things we think, say or do:

1. **Is it the TRUTH?**
2. **Is it FAIR to all concerned?**
3. **Will it build GOODWILL and BETTER FRIENDSHIPS?**
4. **Will it be BENEFICIAL to all concerned?**

Rotary Code of Conduct

As a Rotarian, I will

1. Act with integrity and high ethical standards in my personal and professional life
2. Deal fairly with others and treat them and their occupations with respect
3. Use my professional skills through Rotary to mentor young people, help those with special needs, and improve people's quality of life in my community and in the world
4. Avoid behavior that reflects adversely on Rotary or other Rotarians





Insert RE-3: Vocational Service Ideas

1. Advancing high ethical standards in the workplace
 - a. In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
 - b. In internal communications, praise and encourage exemplary behavior on and off the job.
 - c. In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.

2. The classification principle
 - a. Classification talks to promote vocational awareness in your club.
 - b. Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
 - c. Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.
 - d. Schedule an occasional meeting in a member's place of employment.
 - e. Invite young people to special vocational meetings.

3. Promote Rotary's commitment to high ethical standards
 - a. Post The Four-Way Test on a prominent billboard in your community.
 - b. Display The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or workspace and talk about it.
 - c. "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
 - d. Sponsor a Four Way Test essay contest.
 - e. Sponsor a joint "character literacy" project for young children.
 - f. Conduct a RYLA event with special emphasis on ethics.
 - g. Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.

4. Recognize and promote the value of all useful occupations
 - a. Make classification talks and business tours part of your club's program.
 - b. Join or form a Rotary Fellowship related to your vocation.
 - c. Sponsor a career day for Rotarians to bring young people to their businesses.
 - d. Support professional development.
 - e. Encourage members to take leadership roles in business associations.
 - f. Sponsor a seminar for small business entrepreneurs.
 - g. Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
 - h. Start a career counseling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.

5. Volunteer for your vocation.
 - a. Mentor a young person/ send to Rotary Leadership Institute (RLI).
 - b. Use Rotary Ideas or Rotary Showcase at Rotary.org to identify a project in need of your specialized vocational skills.

Modified by RLI from An Introduction to Vocational Service 255-EN (1009)



SCENARIO – 1: Misuse of Club Funds

The Downtown Rotary Club is a well-established and highly active organization with a strong membership base. The club has a long-standing tradition of members contributing both their time and financial resources to support various community projects, scholarships, and international aid initiatives. Due to its size and effectiveness, the club has built a solid financial foundation, allowing it to fund multiple charitable activities annually.

The current Treasurer has been in the role for over a decade and has always been regarded as trustworthy and experienced. However, he has been resistant to adopting modern financial management tools, including electronic payment processing and digital bookkeeping.

For the first time in years, the club's Board of Directors decided to conduct an independent audit of its financial records. This decision was driven by growing concerns from some members about the lack of transparency in financial reporting and the increasing complexity of managing large sums of money using outdated manual processes.

As the audit progressed, the accountants discovered inconsistencies in financial records. Significant amounts of money were unaccounted for, and there were transactions recorded without proper documentation.



SCENARIO – 2: Creating a Satellite Club

A small-town Rotary club planned to form a satellite club after realizing that its 7am meeting time excluded a significant group of potential members whose obligations prevented them from attending at that time. The club explored the possibility of establishing a satellite club that would meet at a more convenient time, allowing for greater participation. The satellite club would collaborate with the parent club on projects, activities, fundraising efforts, and financial planning to ensure a unified approach to service and community impact. A few club members have concerns about the implementation, management and possible member movement to the other club.

SCENARIO – 3: Changing Club Name

A primary objective of the Rotary club was membership recruitment, particularly attracting younger professionals, as the club's demographic was aging and consisted primarily of retired men. To improve its image and appeal to potential members, the club board and membership committee examined how the club appeared in online searches, recognizing that this is the primary way newcomers discover clubs to visit.

During this process, it became evident that the club's name no longer accurately reflected its identity. It did not represent where members met, lived, or worked. Additionally, the name was associated with an area of the city that had become rundown and lacking business opportunities, which further discouraged potential members. For these reasons, the club leadership proposed a name change and presented the plan to the club membership.



Strategic Planning & Analysis

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

Session Goals

Analyze your Rotary Club
Review possible areas of improvement
Discuss how specific improvements could be made
Explore the strategic planning process

Materials

Insert SPA-1: Good to Know for Strategic Planning & Analysis

Insert SPA-2: Rotary Club Health Check

Insert SPA-3: Strategic Planning Guide.

Insert SPA-4: Rotary's 5 Year Strategic Plan

Insert SPA-5: Rotary's Plan of Action

Look at: <https://my.rotary.org/en/document/strategic-plan>

Session Topics

- 1) Describe the merits of a Rotary Club Assessment (Rotary Club Health Check (SPA-2))

“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



2) Review the Club Health Check Insert SPA-2: Rotary Club Health Check and consider using it back in your home club as a basis for long range planning.

a) Where are we now?

b) Where do we want to be?

c) How do we get there?

3) Rotary International has a Strategic Plan. (See Insert SPA-4). What is the relation of the RI Strategic Plan to your club’s strategic plan? How can you use it in your club’s strategic planning process?

4) How do we begin to consider creating a strategic plan for our clubs if one doesn’t exist already? How often does the plan need to be reviewed? How flexible is the plan? When and how can it be changed?

“...There is so much pleasure in Rotary activities. The [regular meetings] bring you into contact with your fellow members. Their diverse interests and knowledge stimulate your interest in your community...The planning for service projects both close by or across some distant horizon carries us out of our own self-interest into the wonderful world of service to others... [and the] pleasing paradox...that we grow in stature when we give of our time and talent to improve the quality of life for someone else. How strange that when we give dignity to someone else, we grow in dignity ourselves...”

1989-90 RI Pres. Hugh M. Archer
— Enjoy Rotary!
THE ROTARIAN, July 1989





Insert SPA-1: Good to Know for Strategic Planning & Analysis

- "Strategic Planning", defined. A systematic process of envisioning a desired future and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them. BusinessDictionary.com
- In contrast to "long-term planning" (which begins with the current status and lays down a path to meet estimated future needs), strategic planning begins with the desired-end and works backward to the current status. BusinessDictionary.com
- Rotary International (RI) has had a Strategic Planning Committee continuously since 2004.
- RI recommends strategic planning to Rotary clubs.
- Rotary clubs are autonomous and develop their own goals and plans.
- RI provides strategic planning resources, including a strategic planning guide and worksheet for clubs.
- Think of a Strategic Plan as a "guidance tool."
- Think of a Strategic Plan as a "work in progress."
- In the process of Strategic Planning, look for disagreements and toward the future.
- Focus on the organization and key stakeholders, not individual actions.
- Sometimes it is best to have an "outsider" lead a strategic planning process since they are not "invested" in the various positions and cliques within a club.
- Professional and volunteer strategic planning resources may be known and identified in your district. The District Trainer in your district may be able to refer you to some resources. Also, the Rotary Director and their team (Zone-level) may have some resources available.



Insert SPA-2: 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





PROGNOSIS



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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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



PROGNOSIS



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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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



PROGNOSIS



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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + Expand the skill sets of your members by recommending professional development courses.
Stagnant or declining membership	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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



PROGNOSIS



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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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



PROGNOSIS



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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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	<ul style="list-style-type: none"> + 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

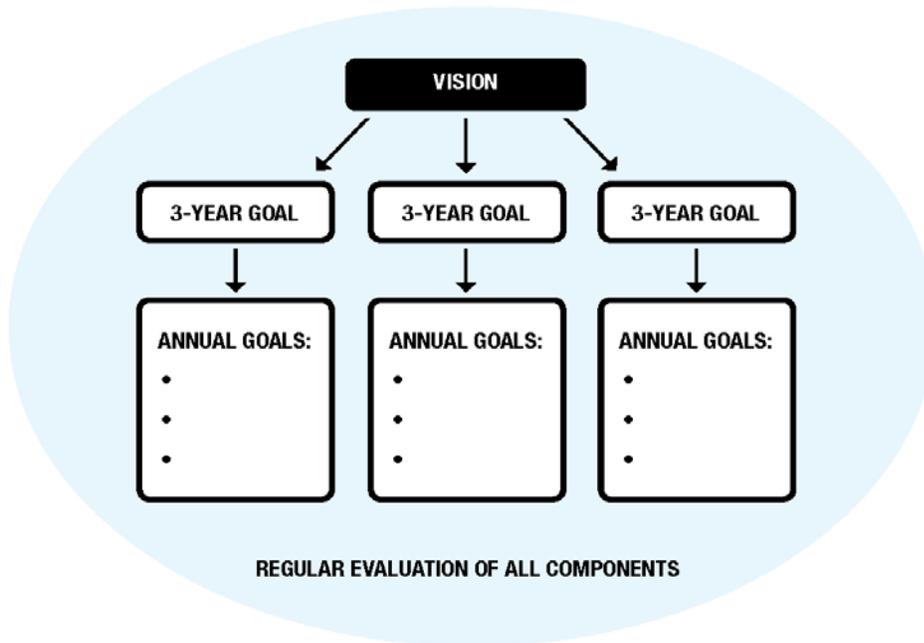
FEATURED RESOURCES

- [Club Planning Assistant](#)
- [Membership Assessment Tools](#)
- [Membership resources](#)
- [Brand Center](#)
- [Learning Center](#)





Insert SPA-3: Strategic Planning Guide (3 pages)



The Strategic Planning Model

Strategic planning involves creating a vision, with supporting goals that can be regularly evaluated and adjusted as needed.

Process

A strategic plan can be developed by completing the process below. Use the accompanying worksheet to record your ideas.

1. Where are we now?

- Describe your club’s current state.
- Brainstorm your club’s strengths and weaknesses.

2. Where do we want to be?

- Create a list of 5-10 characteristics that you would like to see in your club three years from now.
- Draft a one-sentence vision statement describing your club three years from now.
- Finalize the vision statement, making sure that all participants support it.

3. How do we get there?

- Brainstorm three-year goals that will help your club achieve the vision, considering:
 - Strengths and weaknesses of the club
 - Programs and missions of RI and its Foundation
 - Involvement of all members
 - Achievability in three years

- Prioritize the three-year goals based on participant consensus. As a group, decide on the top two or three goals that will have the greatest impact as your club works toward the vision.
- Identify annual goals that support each of the top three-year goals.
- Determine the deadlines, resources, and people necessary for meeting the first annual goal for each of the three-year goals.

4. How are we doing?

- Create a strategic planning team to regularly monitor progress and recommend revisions to the plan.
- Allocate sufficient resources for the plan’s implementation.
- Evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
- Review the strategic plan annually, including the vision statement, three-year goals, and annual goals, and revise as needed.
- Repeat the full strategic planning process every three years to create a new plan or affirm the current one.



Strategic Planning Worksheet

Use the process outlined on the previous page to complete this worksheet and create your strategic plan.

1. Where are we now? _____

Today's date: _____

Describe your current state:

Strengths:

Weaknesses:

2. Where do we want to be? _____

Target date: _____

Key characteristics of future state:

Vision Statement:



3. How do we get there? _____

In order to reach the vision, the following goals must be achieved:

Three-year goals:

In order to achieve the three-year goals, the following annual goals must be achieved.

Note: There is no limit to the number of three-year or annual goals for your strategic plan.

Three-year goal 1: _____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Three-year goal 2: _____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Three-year goal 3: _____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

4. How are we doing?

List the actions that you will take to follow up on implementation of the plan:



Insert SPA-4: Rotary's Strategic Plan

Vision Statement

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

Mission Statement

We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

Action Plan

As People of Action, we share a strong sense of purpose. More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—and shares the vision of a better world.

As People of Action, we understand that fulfilling that vision requires a plan. This is Rotary's current plan:

Priorities

PRIORITY 1- Increase Our Impact

People of Action are effective problem-solvers. Let's seek out new ways to translate our expertise into making a difference—in our communities and across the globe. Let's prove that our impact on the world has only just begun.

PRIORITY 2- Expand Our Reach

People of Action activate and inspire one another. Let's build connections and opportunities that will allow people who share our drive to do the same.

PRIORITY 3- Enhance Participant Engagement

People of Action strive to understand the needs of others. Let's recommit to putting the needs, expectations, and growth of our participants at the center of all we do.

PRIORITY 4- Increase Our Ability to Adapt

People of Action are inventive, entrepreneurial, and resilient. Let's stay true to ourselves and stay ahead of change in our next 115 years.

By helping to realize the goals of this plan, you ensure a stronger and even more effective future for Rotary – a tremendous legacy. Our plan is rooted in the tried-and-true values and builds on the remarkable capabilities and spirit of Rotary members. It is clear-eyed about the challenges that Rotary and the world face. It protects the value of human connection in an age of technology. It lays out a path for bringing great ideas to the forefront of the global imagination of what's possible. And our plan will provide us with a continuity of vision from year to year, keeping us moving toward fulfilling our shared purpose. The Action Plan is detailed on RI's website (<https://my.rotary.org/en/who-we-are/about-rotary/action-plan>). In addition to detailing the four priorities, this page contains many links to additional information about our organization's plan for today and tomorrow. Check them out.



Insert SPA-5: Rotary Action Plan



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.



- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

- 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

- 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

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

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Targeted Service (Foundation II)



The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.

Session Goals

Compare the differences between Rotary International and The Rotary Foundation

Describe the importance of The Rotary Foundation Funding Model

Explore the Six Areas of Focus and sustainability and their use in Global Grants

Materials

Insert TS-1: Good to Know for Targeted Service

Insert TS-2: SHARE Flowchart

Insert TS-3: Rotary Foundation Funding Model Flowchart

Insert TS-4: What is Sustainability?

Insert TS-5: Areas of Focus Chart

Insert TS-6: Targeted Service Case Studies

While this course and others within RLI discuss The Rotary Foundation topics and the programs of our Foundation, you should consult your district for specific Rotary Foundation educational and training opportunities.

The Mission of **The Rotary Foundation** (“TRF”)

“The Rotary Foundation helps Rotary members to advance world understanding, goodwill and peace by improving health, providing quality education, improving the environment and alleviating poverty.”

Session Topics

- 1) Review Insert TS-1: Good to Know for Targeted Service
- 2) The Rotary Foundation is the charitable arm of Rotary. It is supported 100% by voluntary contributions. Donations to TRF make possible projects that bring sustainable improvements in local communities. (Insert TS-2 SHARE Flowchart and Insert TS-3 Rotary Foundation Funding Model Flowchart)
 - a) What are the key differences between RI and TRF?



- 3) What are some project ideas your club or other clubs have done locally, using District Grants, participated in Internationally and/or using Global Grants?

- 4) SUSTAINABILITY IS: (Insert TS-4 What is Sustainability?)
 - a) Rotary incorporates sustainability in what ways?

 - b) What roles do the seven Areas of Focus play? (Insert TS-5 Areas of Focus Chart)

- 5) SHARE System – Spreading the impact of annual fund giving to meet priorities of TRF and encourage engagement. (Insert TS-2 SHARE Flowchart)
 - a) Year 1 – money donated to annual fund. Remain with TRF through year 2 and 3
 - b) After three years, funds are returned back with 50% to the District from which it came and 50% to the World Fund. (A 5% deduction for expenses is taken to cover administrative costs)
 - c) Districts receiving funds, (District Designated Funds – DDF) have them available for Local and International projects to be distributed at their discretion. EACH DISTRICT ESTABLISHED ITS OWN CRITERIA.
 - d) How does SHARE benefit your club and district?

- 6) Case Study Insert TS-6: Targeted Service Case Studies



- 7) Questions to ponder:
- a) Why are partnerships with other organizations significant? Does your club have any official or unofficial partnerships?
 - b) How can participation in The Rotary Foundation help a club's public image?
 - c) How can an understanding of the mechanics of the Rotary Foundation encourage you as a member of your Rotary Club to participate and contribute to do good in the world?
 - d) How can the Rotary Foundation Funding Model encourage Rotarians to participate and contribute? Can the Funding Model help a club's public image?
- 8) Check out the Learning Center (<https://learn.rotary.org>) for more information on The Rotary Foundation. You will find a plethora of short online courses that contain the most up-to-date information.

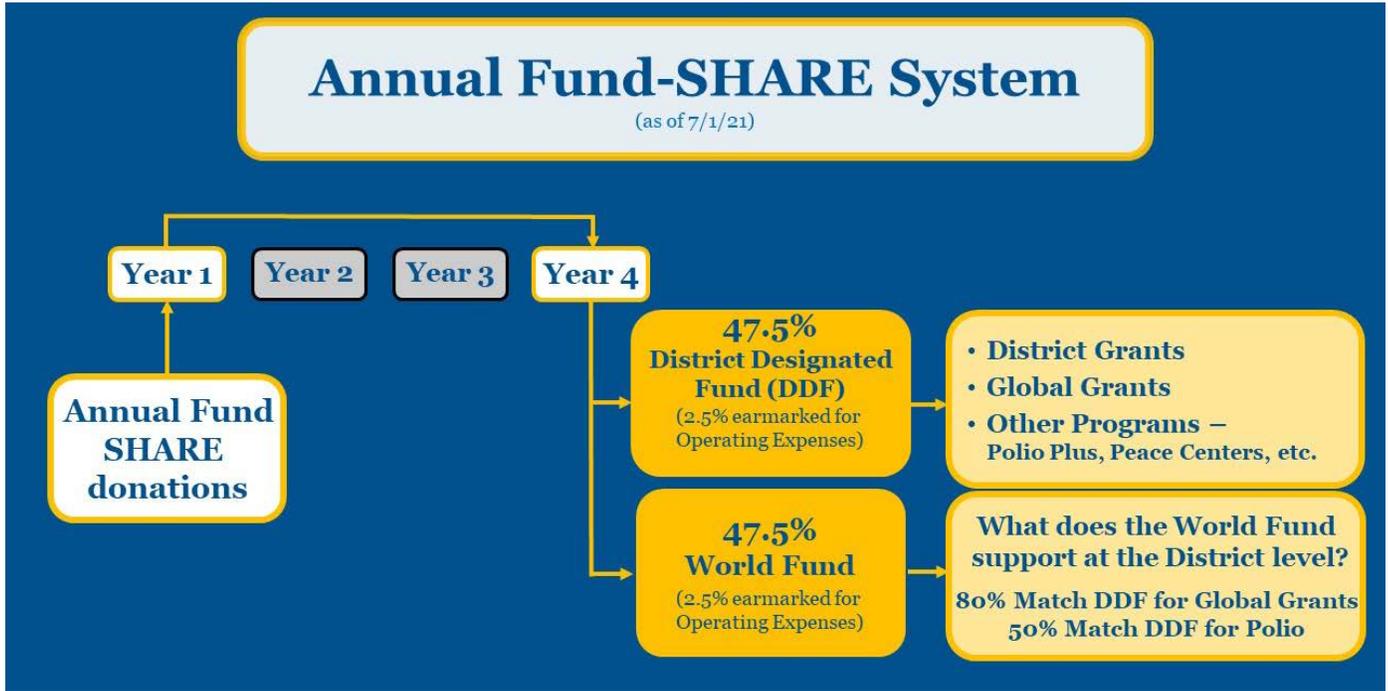


Insert TS-1: Good to Know for Targeted Service

- The Mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.
- The Learning Center at [Rotary.org](https://www.rotary.org) contains self-paced courses and webinars on Service and Grants topics, with links to specific and regularly updated resources.
- MyRotary (member-only, secured site at [Rotary.org](https://www.rotary.org)) also has Discussion Groups on related topics, Rotary Showcase and Rotary Ideas (crowdfunding) sites.
- A “community assessment” is the process of examining a community’s strengths, weaknesses, assets, gaps, and needs to determine which issues should be addressed, existing resources to address identified gaps, and the best course of action to address identified needs.
- “Sustainability” is the ability to operate a project or program on its own without support from Rotary. Sustainability is often used as a measure of a project’s long-term effectiveness.
- The Seven Areas of Focus provide a basis for Global Grants. Applications for these projects will identify one or more areas of focus which their project addresses.
- A “cooperating organization” is any reputable organization or academic institution that provides expertise, infrastructure, advocacy, training, education, or other support for a humanitarian initiative.
- District Resources include your District Rotary Foundation Chair, the District Grant Chair, and the events that they hold during the year. Please see your district website for more information.



Insert TS-2: SHARE Flowchart



SHARE and District Designated Fund

How does the SHARE system work? Through the SHARE system, contributions to The Rotary Foundation are transformed into grants that fund local and international humanitarian projects, scholarships, and activities, such as vocational training teams (VTT). At the end of every Rotary year, contributions directed to the Annual Fund-SHARE from all Rotary clubs in the district are divided between the World Fund and the District Designated Fund (DDF), after 5% is deducted for operating expenses.

At the end of three years, your district can use the DDF to pay for Foundation, club, and district projects that your club and others in the district choose. Districts may use up to half of their DDF to fund district grants. The remaining DDF may be used for global grants or donated to PolioPlus, the Rotary Peace Centers or another district.

World Fund

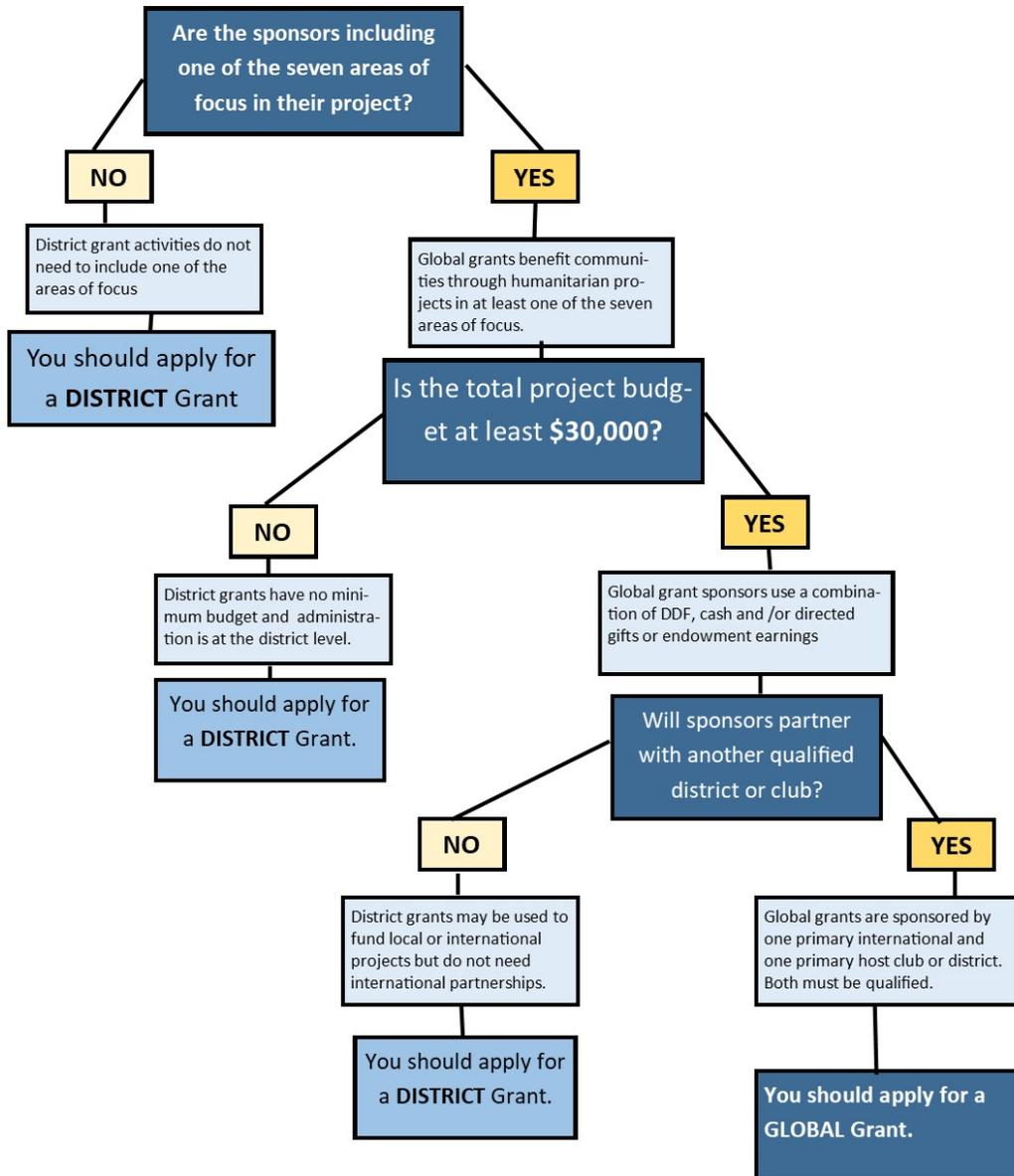
The World Fund provides the necessary funding for our highest priority activities around the globe. While 47.5% of SHARE-designated contributions are applied to the World Fund, you can also direct your entire gift to the fund. The Foundation uses the money to pay for grants and program opportunities available to all Rotary districts.



Insert TS-3: Rotary Foundation Funding Model Flowchart

Determining a Grant Type for a Humanitarian Project

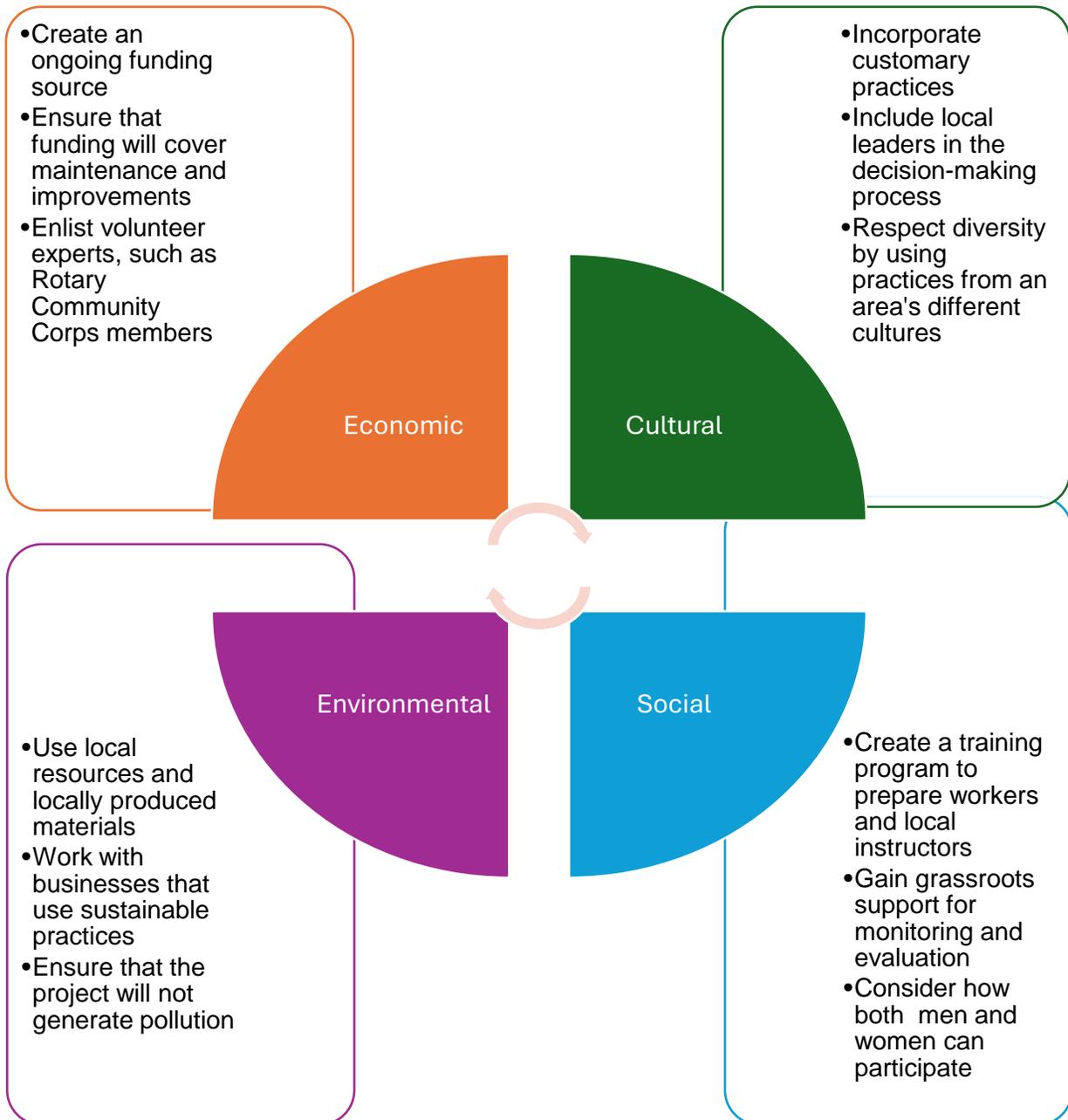
A district/club is interested in a humanitarian project. The following questions can help Rotarian sponsors determine whether to apply for a GLOBAL grant or DISTRICT grant.





Insert TS-4: What Is Sustainability?

The word sustainable often describes something that is environmentally friendly. But environmental concerns are just one aspect of sustainability. Economic, cultural, and social factors are equally important. When a humanitarian project addresses all four levels of sustainability, it has a better chance of producing long-term benefits for the community it serves. Here are examples of ways to incorporate sustainability into your next project. [From *The Rotarian*, Feb. 2012]





Insert TS-5: Areas of Focus Chart

The Rotary Foundation Areas of Focus

TRF MISSION	The Mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education and the alleviation of poverty.							
								
AREAS OF FOCUS	Peace and Conflict Resolution	Disease Prevention and Treatment	Water and Sanitation	Maternal and Child Health	Basic Education and Literacy	Economic and Community Development	Supporting the Environment*	
STATEMENT OF PURPOSE	The Rotary Foundation promotes the practice of peace and conflict resolution	The Rotary Foundation reduces the causes and effects of disease by:	The Rotary Foundation ensures that people have sustainable access to water and sanitation by:	The Rotary Foundation improves the lives of mothers and their children by:	The Rotary Foundation promotes education and literacy for all by:	The Rotary Foundation invests in people to create measurable and enduring economic improvement in their lives and communities by:	The Rotary Foundation enables Rotary members to protect, preserve, and conserve the environment by:	
GOALS	<ol style="list-style-type: none"> 1. Strengthening local peace efforts. 2. The Rotary Foundation promotes the practice of peace and conflict. 	<ol style="list-style-type: none"> 1. Improving the capacity of local health care professionals. 2. Combating the spread of HIV/AIDS, malaria and other major diseases. 	<ol style="list-style-type: none"> 1. Increasing equitable community access to safe drinking water and basic sanitation. 2. Strengthening the ability of communities to develop and maintain sustainable water and sanitation systems. 	<ol style="list-style-type: none"> 1. Reducing the mortality rate for children under the age of five. 2. Reducing the maternal mortality rate. 	<ol style="list-style-type: none"> 1. Ensuring that children have access to quality basic education. 2. Reducing gender disparity in education. 	<ol style="list-style-type: none"> 1. Strengthening the development of local entrepreneurs and community leaders, particularly women in impoverished communities. 2. Developing opportunities for decent and productive work, particularly for youth. 	<ol style="list-style-type: none"> 1. Protecting and restoring land, coastal, marine and freshwater resources. 2. Enhancing the capacity of communities and local governments to support natural resource management and conservation. 3. Supporting agroecology and sustainable agriculture, fishing and aquaculture practices to improve ecological development. 4. Addressing causes of climate change and climate disruption and supporting solutions to reduce the emission of greenhouse gasses. 	Goals 5-8 found in document "Rotary International Area of Focus Environment"
	<ol style="list-style-type: none"> 3. Supporting Long-term peace-building in areas affected by conflict. 4. Assisting vulnerable populations affected by conflict, particularly children and youth. 	<ol style="list-style-type: none"> 3. Enhancing the health infrastructure of local communities. 4. Educating and mobilizing communities to help prevent the spread of major diseases. 	<ol style="list-style-type: none"> 3. Educating communities about safe water, sanitation, and hygiene. 4. Supporting studies related to water and sanitation. 	<ol style="list-style-type: none"> 3. Improving access to essential medical services and trained health care providers for mothers and their children. 4. Supporting studies related to maternal and child health. 	<ol style="list-style-type: none"> 3. Increasing adult literacy. 4. Strengthening the capacity of communities to support basic education and literacy. 	<ol style="list-style-type: none"> 3. Building the capacity of local organizations and community networks to support economic development. 4. Supporting studies related to economic and community development. 	<ol style="list-style-type: none"> 5. Supporting studies related to peace and conflict resolution. 5. Supporting studies related to disease prevention and treatment. 	



Insert TS-6: Targeted Service Case Studies

Case Study A

John and Mary come to live in a new country where they do not speak the local language. They find it difficult to fit into the community. They attend the local schools but have limited resources for individual language training. Their parents speak only their native language, increasing the sense of isolation for the whole family.

This is one family but there are many families with the same issues in the community. Your Rotary Club has decided to supply bilingual dictionaries as needed to all the local schools. It is determined that there are three hundred students in the schools in the 5th grade. Each dictionary costs US \$5.

Conduct small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

Each group reports back to the whole group on each question explaining their reasoning for their answers.

Case Study B

The residents of Patari, a village in Uttar Pradesh, are among 25 million people in India who suffer the consequences of fluorosis, an irreversible condition caused by elevated levels of fluoride in drinking water. The painful effects of fluorosis can include bone deformities, calcification of ligament and tendons, and osteosclerosis (abnormal bone density). Dental effects include mottling and erosion of tooth enamel. The fluoride, because of its strength, rots teeth and destroys bones. Your district would like to work with the district in India to provide fluoride filters to 60 families in Patari through a Rotary Foundation grant-funded project. The US \$40,000 project also provided toilets, safe drinking water, and hygiene training to eight schools serving about 2,300 students in Uttar Pradesh.

The World Health Organization estimates that almost one-tenth of global disease could be prevented by improving the water supply, sanitation, hygiene, and the management of water resources. As the Indian villages demonstrate, the solution requires a targeted approach, including assessments of each community's needs.

Small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

Each group reports back to the whole group on each question explaining their reasoning for their answers.



Team Building

I can lead and promote my club's collaboration in effective and motivated groups to accomplish our goals of service.

<p>Session Goals</p> <p>Explore how team building and committees are used in Rotary Clubs</p> <p>Discuss the advantages and disadvantages of committees</p> <p>Examine committees as a tool of leadership</p>	<p>Materials</p> <p><u>Insert TB-1</u>: Good to Know for Team Building</p> <p><u>Insert TB-2</u>: Urbana University of Illinois Exercise</p> <p><u>Insert TB-3</u>: Exercise Follow-Up</p> <p><u>Insert TB-4</u>: Sample Club Committee Structures</p>
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This is a course in the Leadership Spiral going across three days of RLI. Prior courses include The Roots of Rotary. Other courses in this session include Strategic Planning & Analysis. Additional courses building on this session are Public Image & Public Relations and Effective Leadership Strategies. Service and Membership have separate spirals.

Session Topics

- 1) Debate Exercise
Resolved: The most effective committee is a committee of one.

Modified Debate Format

2 min	Affirmative 1	State your case
2 min	Negative 1	Tear down the case
2 min	Affirmative 2	Rebut, rebuild case, add advantages
2 min	Negative 2	Continue to tear down case
2 min		TIMEOUT
1 min	Negative 1	Summarize
1 min	Affirmative 1	Summarize
1 min	Negative 2	Conclude
1 min	Affirmative 2	Conclude

- 2) Urbana University Exercise (Ins. TB-2)
- 3) How can we make effective use of Rotarian teams and committees? How important is delegation of tasks and duties?

You are [busy people]; were not such the case you would not be Rotarians; but remember that the [chair] of your division is a busy [person], and he has made himself busier than ever by the assumption of the duties of his [position]... In this, as in all other things, let us work together, because to do so is to be Rotarian.

Paul P. Harris
Founder of Rotary
— Messages from the President
January 1912



Insert TB-1: Good to Know for Team Building

- Rotary Clubs and the committees within clubs are teams, just like in business, sports, or other endeavors.
- The organization of a club, i.e., its committee structure, is completely up to the club to determine. There are several alternative recommended committee structures by Rotary for clubs to consider. Clubs should pick or design a committee structure that matches their personnel, club culture, and dynamic.
- "Individual commitment to a group effort--that is what makes a teamwork, a company work, a society work, a civilization work." --*Vince Lombardi*
- "Talent wins games, but teamwork and intelligence win championships." --*Michael Jordan*
- "Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results." --*Andrew Carnegie*
- "Alone we can do so little, together we can do so much." --*Helen Keller*
- "I invite everyone to choose forgiveness rather than division, teamwork over personal ambition." --*Jean-Francois Cope*
- "None of us is as smart as all of us." --*Ken Blanchard*
- "Coming together is a beginning. Keeping together is progress. Working together is success." --*Henry Ford*
- "The strength of the team is each individual member. The strength of each member is the team." --*Phil Jackson*
- "Collaboration allows teachers to capture each other's fund of collective intelligence." --*Mike Schmoker*
- "It takes two flints to make a fire." --*Louisa May Alcott*
- "Unity is strength. . . when there is teamwork and collaboration, wonderful things can be achieved." --*Mattie Stepanek*
- "The best teamwork comes from [people] who are working independently toward one goal in unison." --*James Cash Penney*



Insert TB-2: Urbana University of Illinois Exercise

Background:

The club began six months ago with four leaders who had become impressed with Rotary through Polio Plus activity and results. They started meeting weekly on Wednesdays at 5:30 and agreed amongst themselves that they would bring together a strong group of leaders like themselves within the next year. The four took on the offices of President, Vice President, Secretary, and Treasurer. To date they have recruited 26 new members.

Within a month, a community service project was accomplished each month. These projects were being so well accomplished by the team of four that new members were recruited by each new project. Each club meeting was a planning meeting for next month's project or a speaker from the community describing a specific need. New members were put in charge of certain parts of the service projects. As members became excited about what the club was able to accomplish, they started to recommend their friends for membership.

New members were also recruited from the club program speakers.

Current Situation:

In two weeks, they will install and welcome ten more members. But the group of four are getting overwhelmed with everything. So, President Jack told the other officers, "we need to build an effective team to help carry the leadership load. I am appointing a committee to produce a recommendation on how we can build a team."

Assignment:

In the next 15 minutes, develop a recommendation on how this club can build a team. What specific steps do they need to follow?



Insert TB-3: Exercise Follow-Up

After completing the chosen exercise, facilitate the following questions among the groups:

- How were the team leader chosen?
- Was a team leader necessary?
- How were the different symbols, colors and design agreed upon?
- What special talents did any team member have that helped the process?
- What methods were used to resolve conflicts?
- How collaborative was the group effort, or did one or two people decide?
- How were the team spokespersons chosen?
- What discussions were used in understanding the goal? Was everyone clear on the objective?
- How did the time element play in the final decisions that were made?
- What could the team have done to become more effective in its final product?
- How does this exercise relate to committee or team activities at the club level?



Insert TB-4: Sample Club Committee Structures

Rotary recommends five club committees. Clubs can add, eliminate, or combine committees or subcommittees according to their interests, activities, and number of members. Assistant governors or district governors can help club leaders determine suitable subcommittees.

OPTION 1: Standard Rotary Club Committees

Club Administration	Membership	Public Image	Service Projects	Rotary Foundation
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Possible Subcommittees:

<ul style="list-style-type: none"> • Club program • Member communication • Website • Social events 	<ul style="list-style-type: none"> • Attraction • Engagement • New member orientation • Diversity 	<ul style="list-style-type: none"> • Media relations • Advertising and marketing • Web and social media 	<ul style="list-style-type: none"> • International • Community • Vocational • Youth service • Fundraising for club projects 	<ul style="list-style-type: none"> • Polio • Fundraising for grants
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OPTION 2: Small Rotary Club Committees:

Club Administration	Membership	Public Image	Service Projects	Rotary Foundation
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OPTION 3: Large Rotary Club Committees

Club Administration	Membership	Public Image	Service Projects	Rotary Foundation
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Possible Subcommittees:

<ul style="list-style-type: none"> • Club program • Club communications • Website • Social events 	<ul style="list-style-type: none"> • Attraction • Engagement • New member orientation • Diversity • New clubs • Membership leads • Assessment 	<ul style="list-style-type: none"> • Media relations • Advertising and marketing • Web and social media 	<ul style="list-style-type: none"> • International • Community • Vocational • Youth service • Fundraising for club projects 	<ul style="list-style-type: none"> • Polio • Fundraising for grants • Grants • Annual giving • Major giving • Stewardship
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Attracting Members

I can lead and promote my club's reexamination of its distinctive position in my community and the quality of members we attract.

Session Goals

- Identify my club's target audience and profile
- Define the attributes of the target audience
- Explore how my club can attract the target audience

Materials

- Insert AM-1: Good to Know for Attracting Members
- Insert AM-2: Membership Assessment Tool
- Insert AM-3: Getting Connected - Networking
- Insert AM-4: The Club Membership Committee

This is a course in the Membership Spiral going across three days of RLI. Prior courses include My Club & Beyond, and Engaging Members. Other sessions in this course include Rotary & Ethics. An additional course building on this session is Club Communications. Service and Leadership have separate spirals.

Session Topic

- 1) What makes a club ATTRACTIVE to potential members?
- 2) After completing the AM-2: Club Profile Sheet, discuss what the results might tell you about your club
- 3) What signature projects and/or events is your club known for in your community?
- 4) If there are other Rotary clubs or service clubs nearby, how are they different than your Rotary club?
- 5) What are the attributes of a growing thriving club?
 - a. As a group, discuss the results of your answers to the preceding questions.
 - b. Choose common characteristics to create a description of your groups' collective club's strengths and weaknesses.
 - c. Identify and discuss this club.
- 6) How can you "fix" a dying club?
- 7) Who should be invited to be a member of your Rotary club? Why?
- 8) What are some recent changes made by Rotary International to address increasing membership?

"When a tree stops growing — it is ready to die...."

A Rotary club is like that: It is moving ahead only when it is growing. When the growing ends, the knife-and fork club begins."

1957-1958 RI Pres. Charles G. Tennent

*— Little Lessons in Rotary (Third Edition),
March 1978*



Insert AM-1: Good to Know for Attracting Members

- The concept of “attracting members” is that a Rotary club should be vibrant and known in their community, and therefore that it should be attractive to prospective members.
- Membership in a Rotary club is by proposal of a member and invitation by the club. You have to “ask”!
- Rotary clubs are members of the association called Rotary International and subject to its charter and bylaws (unless modified) requirements regarding membership
- Rotary clubs select their own members but are subject to the laws of their area and Rotary policies on membership
- The 2016 Council on Legislation, “Rotary’s Congress” passed several changes allowing clubs to decide what works best for them around attracting members. Some of the changes:
 - Clubs can decide to vary their meeting times
 - Clubs decide whether to meet online or in person
 - Clubs decide when to cancel a meeting, as long as they meet at least twice a month
 - Clubs can provide a service activity or other club function which can serve as a meeting
 - Clubs have flexibility in choosing their membership rules and requirements.
- Replaced the previous six membership criteria from the RI Constitution with a simple requirement that a member be a person of good character who has a good reputation in their business or community and is willing to serve the community
- Rotary continues to promote “New Generations” policies targeted toward introducing younger persons to Rotary, including making Rotary membership more convenient and affordable
- Women constitute less than 25% of Rotarians in North America. Women have been eligible to join Rotary since 1989.



Insert AM-2: Membership Assessment Tool

(<https://my.rotary.org/en/learning-reference/learn-topic/membership>)

Is your club strong or are you struggling? Either way, take time to evaluate what you are doing. Using assessment tools will reveal opportunities to add value to your club experience so that more people will join, and fewer members will leave. Here are some possibilities available in Rotary:

- [Representing Your Community's Professions](#) (classification assessment)
- [Diversifying Your Club](#) (member diversity assessment)
- [Finding New Club Members](#) (prospective member exercise)
- [Improving Your Member Retention](#) (retention assessment and analysis)
- [Enhancing the Club Experience](#) (member satisfaction survey)
- [Understanding Why Members Leave](#) (exit survey)

In the Membership Assessment Tool referenced above, steps are outlined for taking a successful classification assessment. Here's how to get started:

Step 1: Gather Member Data

Have all members complete the Occupation and Professional Expertise Survey on page 1.4 of the assessment tool.

Step 2: Evaluate the Data

Analyze the completed Occupation and Professional Expertise Surveys and fill in the Classification Audit on page 1.6 of the tool

Step 3: Collect Data on Your Community

Gather data about the professional makeup of your community. Fill in the Classification Audit table with the top five professions in your community.

Step 4: Analyze the Data

Use the results of the Classification Audit to determine which professions should be added to your club for balance.

Step 5: Present the Results

Share the results and recommended actions at your club meeting.

Step 6: Take Action

Identify qualified prospective members according to the gaps you found in your club's classifications.

Refer to the Membership Assessment Tool for detailed information and tools for your use.



Insert AM-3: Get Connected - Networking

GET CONNECTED!

Make your Rotary experience truly international with these networking opportunities.

The infographic is a circular network diagram on a dark blue background. It features two main categories: 'CONNECT WITH A GROUP' (represented by a group of people icon) and 'CONNECT IN PERSON' (represented by two people shaking hands icon). The 'CONNECT WITH A GROUP' category includes: 'Make new friends: Rotary Fellowships', 'Build peace and strengthen relationships: Intercountry Committees', 'Share your service accomplishments: Rotary Showcase', 'Enhance service projects: Rotarian Action Groups', and 'Engage with other members: Online Discussion Groups'. The 'CONNECT IN PERSON' category includes: 'Meet prospective partners: Project Fairs', 'Share your professional talents: Vocational Training Team', 'Collaborate on service projects: Rotary Ideas', 'Share international hospitality: Rotary Friendship Exchange', and 'Celebrate club partnerships: Twin Clubs'. The 'Rotary Showcase' node is centrally located and connects to both categories.

CONNECT WITH A GROUP

- Make new friends: **Rotary Fellowships**
- Build peace and strengthen relationships: **Intercountry Committees**
- Share your service accomplishments: **Rotary Showcase**
- Enhance service projects: **Rotarian Action Groups**
- Engage with other members: **Online Discussion Groups**

CONNECT IN PERSON

- Meet prospective partners: **Project Fairs**
- Share your professional talents: **Vocational Training Team**
- Collaborate on service projects: **Rotary Ideas**
- Share international hospitality: **Rotary Friendship Exchange**
- Celebrate club partnerships: **Twin Clubs**

Rotary 

EXCHANGE IDEAS: www.rotary.org/myrotary



Insert AM-4: The Club Membership Committee

The role of the club membership committee is to develop and implement an action plan for membership development. To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the size and strength of your club's membership base.

The responsibilities of the club membership committee summarized below are explained further on Rotary's Membership Learning Reference page at <https://my.rotary.org/en/learning-reference/learn-topic/membership>. The boxed material is taken from the Club Membership section of The Planning Guide for Effective Rotary Clubs.

- Educate club members on how to attract new members and keep them involved
- Conduct classification surveys
- Look at your club's meetings, projects, and other activities and assess what it offers new members
- Develop a membership action plan to improve membership satisfaction
- Conduct club assessments to ensure that membership development and retention efforts succeed
- Sponsor newly organized clubs in your district if you choose to
- Collaborate with the public relations committee to create a positive club image that is attractive to prospective and current members alike.
- Develop programs to educate and train new and current club members.
- Sponsor newly organized clubs in your district, if applicable.

How does the club plan to achieve its membership goals? (check all that apply)

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have the club reflect the diversity of the community
- Explain the expectations of membership to potential Rotarians
- Implement an orientation program for new members
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor to every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe): _____

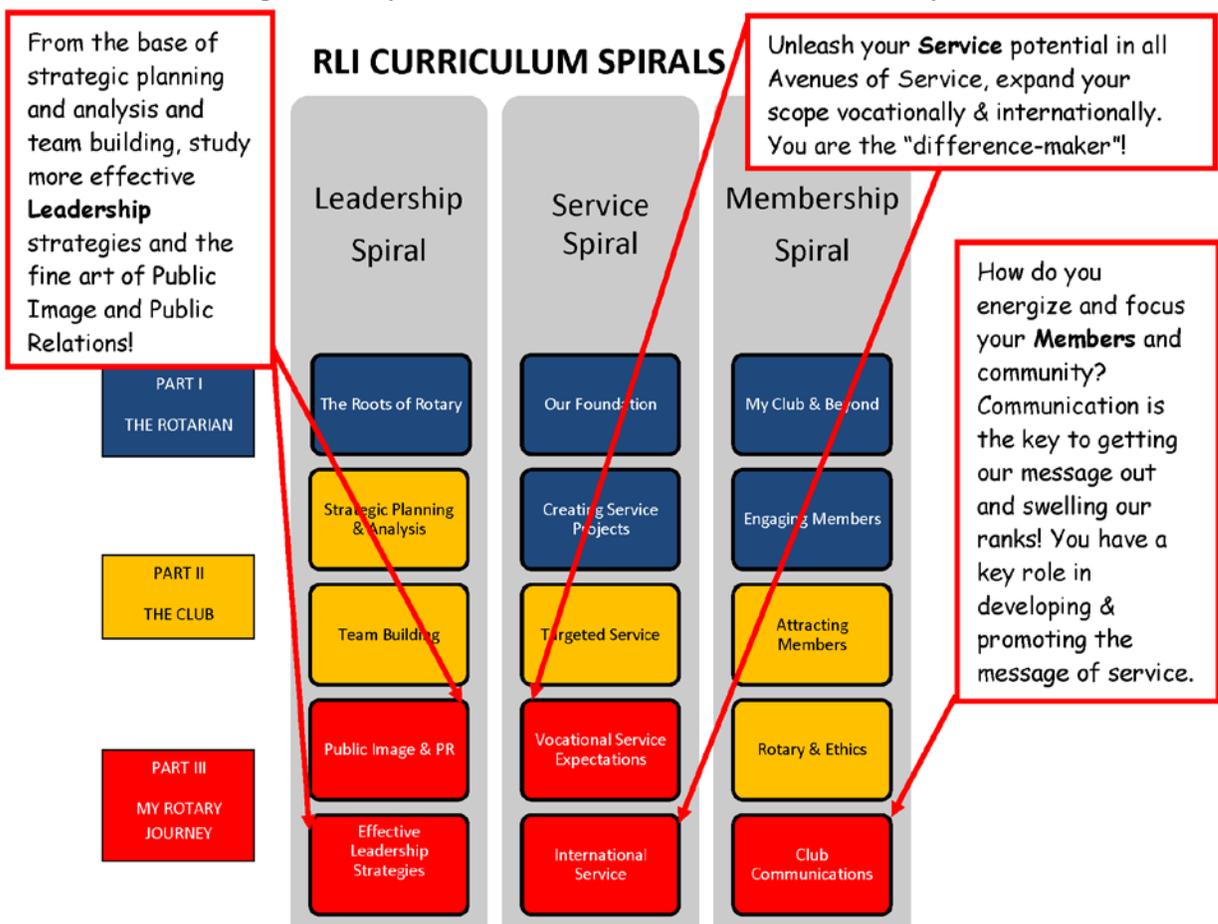


What Action Steps Can You Take?



Coming Attractions- Previewing RLI Part III

Part I centered on the basics of being a Rotarian. Part II builds on the Part I courses, and seeks to increase your effectiveness in your Rotary club! Part III opens the door to higher Rotary service and critical examination of more complex issues!



***** Sign Up for RLI Part III Now! *****

Sign up for RLI Part 3 at midatlanticrli.org