A Joint Project of over 400 Rotary Districts worldwide

2025-27

Participant—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.rotaryleadershipinstitute.org**

The RLI Curriculum Committee. RLI has assembled an international committee of professional curriculum writers to review our material. The material is also reviewed by volunteers from Divisions around the world and then translated. We welcome volunteers for any of these committees! Please contact newsletter@rotaryleadershipinstitute.org

2025-2027 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



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 **24**

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 **30**

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 **37**

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

Making a Difference **45**

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

Planning for Success



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

Session Goals:

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

Resources (download PDFs from our website)

- Rotary Club Health Check PDF
- Membership Assessment Tools https://my.rotary.org/en/document/membership-assessment-tools
- Rotary Learning Center

Session Topics

1. Rotary International suggests that clubs develop strategic plans.

2. Does your club have a plan?

3. What is the first step in creating a strategic plan?

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

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

Summary

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

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

Action with vision brings hope to the world."

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

SMART Goals

S Specific

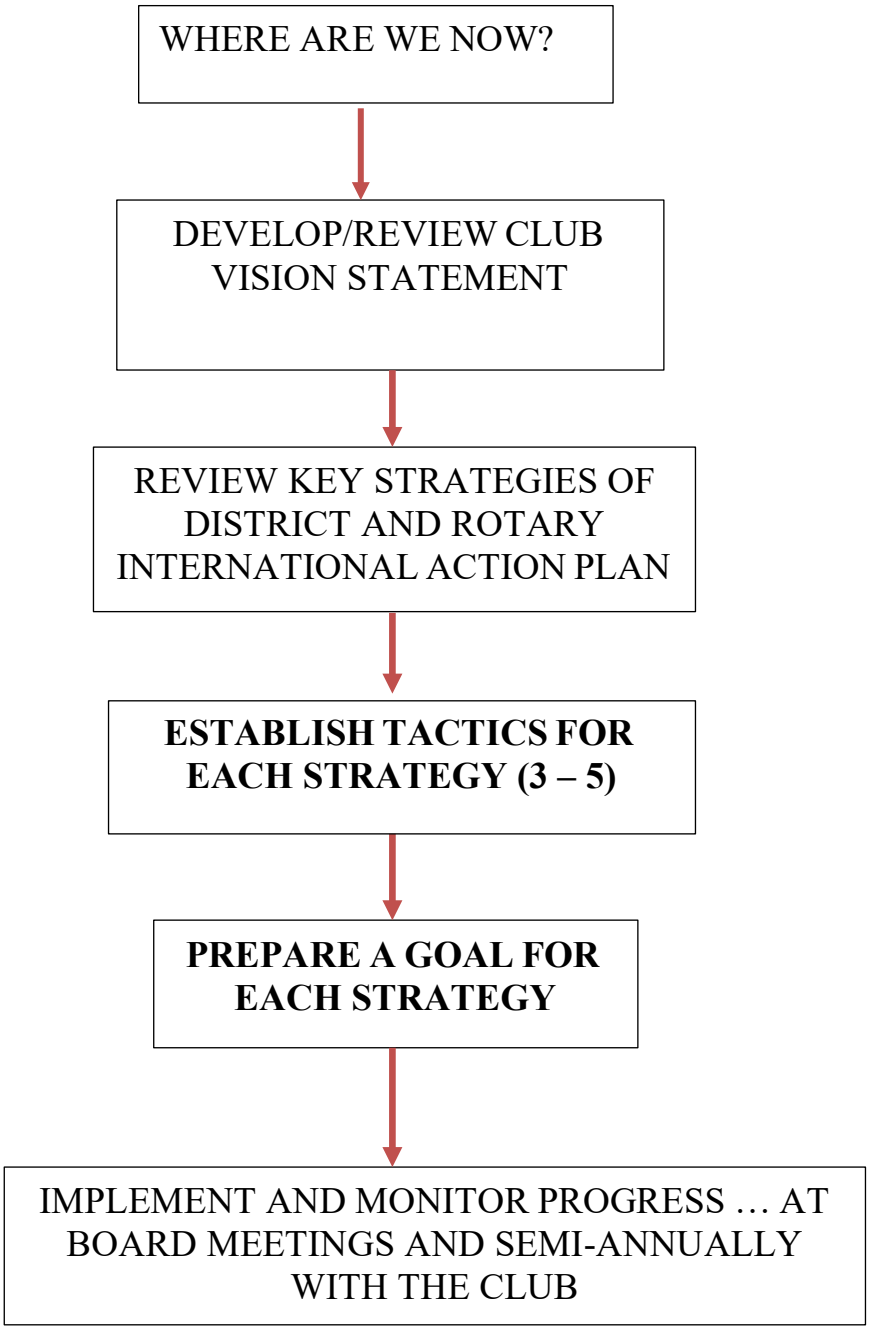
M Measurable

A Attainable

R Relevant

T Time Stamped

Strategic Plan Simplified



WORKING TEMPLATE FOR A CLUB'S STRATEGIC PLAN

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

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

Strategy #3: Increase Participant Engagement	
We can meet our members' diverse needs and keep them engaged while helping them with their personal and professional goals. Active and intentional member engagement will make our clubs stronger and assist us in creating meaningful relationships.	
TACTICS	**FIRST YEAR GOALS**

Strategy #4: Increase Our Ability to Adapt	
New projects, new clubs and new perspectives will maintain our connections and ability to make a difference.	
TACTICS	**FIRST YEAR GOALS**

NOTE: This page is NOT in the student guide!! For DL reference only

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



Match each activity to ONE of the four Strategies in the Rotary Action Plan.

Which one(s) might best be suited to your club's needs and aspirations at this time … or … which one(s) of these best match your club's vision.

If applicable, modify one of these suggested activities to match your club's needs and aspirations and link it to one of the four strategies.

Identify the main issues/concerns/needs in your local community

Review your club's use (or lack of such) of emerging technologies

Survey your members to see what is important to them in a club experience

Budget for new ideas and initiatives that might help your club to be more responsive to the local community.

Use the Rotary Learning Centre courses as part of a regular Rotary Club meeting

Use social media to tell the community what your club does

Apply for a District or Global grant to support a project

Review club activities to determine which ones can be streamlined or eliminated in order to free up time for impactful activities

Survey your community with the intent of establishing a new club using one of the flexible models available.

Make succession planning in your club a part of the annual processes.

Strategic Planning Guide (SWOT)

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

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

Strategic Planning Worksheet

1. **Where are you now?**

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

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

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.

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. All Members have logged into Rotary.org ..... _____
7. The club publishes a regular newsletter / update to website ..... _____
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 Club Excellence Award 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 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. 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)..... _____
39. 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)..... _____
40. 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)..... _____
41. 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)..... _____
42. 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). ..... _____
43. 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. ..... _____
44. 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 1–44 ***Club Administration*** _____

Don't knows _____

Membership

1. 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). _____
2. Last year, the club's membership **increased** (5), **remained the same** (3), **decreased** (0), don't know (DK)..... _____
3. This year the club membership is likely to **increase** (5), **remain the same** (3), **decrease** (0), don't know (DK). ..... _____
4. 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)..... _____
5. When a member relocates to another community, the club **always** (5), **sometimes** (3), **never** (0) notifies the nearest Rotary club of the move ..... _____
6. New members are **always** (5), **sometimes** (3), **never** (0) encouraged to become active in the club ..... _____
7. 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 ..... _____
8. 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***

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

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

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 Annual Fund 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 VTT 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 or VTT 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 Society 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..... _____
    - 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 fundraisers 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

1. Our club **always** (5), **often** (3), **seldom** (1) **never** (0) has articles or pictures of our activities in the local media and/or social 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

1. I receive the Rotary 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 websites **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*** _____

T otals

Total Club Administration (from page 7)	_____	out of 235 points	**DKs** _____	(38)
TotalMembership (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.

The Rotary Foundation: International Service



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

Session Goals:

- Learn about opportunities for international service
- Utilize our vocational skills on international projects
- Learn how Rotary Action Groups broaden our service
- Explore ideas for international service

Resources

- Rotary Service Project Center https://spc.rotary.org/
- Rotary Friendship Exchange https://www.rotary.org/en/our-programs/friendship-exchange
- Guide to Global Grants https://my-cms.rotary.org/en/document/guide-global-grants
- 6 steps to Sustainability https://my-cms.rotary.org/en/document/six-steps-sustainability
- Community Assessment Tools https://my-cms.rotary.org/en/document/community-assessment-tools
- Global Grant Calculator: https://my-cms.rotary.org/en/document/global-grant-calculator

Session Topics

1) What is International Service?

2) Why do we do international service?

3) What kinds of grants are available for an international project?

4) If we want to apply for a Global Grant, what do we need to have?

7) How can we utilize our vocational skills in international service?

8) How can we find an international project? What if we want a partner for a project in our country?

Summary

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

What is an International Service Project?

International Service Projects aim to:

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

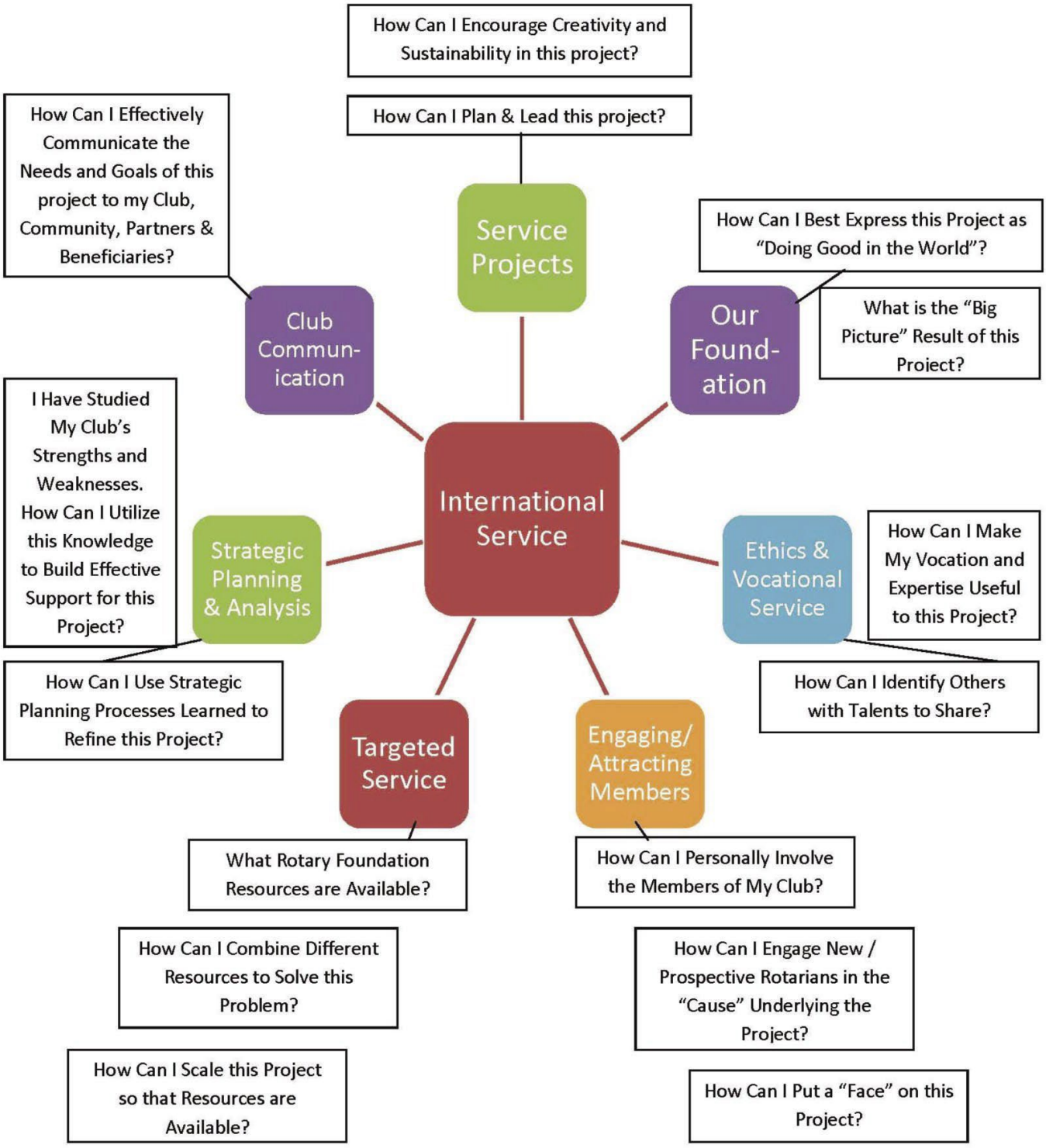
Global Grant projects must adhere to specific criteria.
Visit the Grant Center at www.rotary.org

Getting Involved

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

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

Bringing It Together in International Service



Exercise Worksheet

Project Needs $40,000 to complete. Work out funding using this worksheet.

		TRF Match
Host Club	$ 1000	$
Sponsor Club	$	$
Host District	$ 000	$ 0
Sponsor District	$	$
Donations	$	$
Fundraiser	$	$
Other	$	$
Minus 5% Fee	$	
TOTAL	$	$

Note: Whenever cash is contributed to the Foundation to help fund a global grant project, an additional 5 percent is applied to help cover the cost of processing these funds. Clubs and districts can receive Paul Harris Fellow recognition points for the additional expense.

This fee does *not* apply to DDF or Direct gifts from a Donor Advised Fund or Endowment Fund

Public Image



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

Session Goals

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

Resources

- Rotary Logos & promotions – Rotary Brand Center https://brandcenter.rotary.org/en-us
- Rotary Learning Center – Club Public Image Committee Basics

Session Topics

1) What is the difference between Publicity, Public Relations, and Public Image?

2) Is there something about your club that the community recognizes?
3)

4) Does your club have a PE Chair? Do you need one? Why? What do they do?

5) Who is the club's target Audience?

Summary:

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

Public Image Case Study

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

The Rotary Club of Royal Gardens is located in a prosperous town of 35,000. The club's 40 members are a cross-section of the Royal Gardens professional community. The club's weekly program attracts prominent local speakers, and members are enthusiastic about their work in the community.

Th club 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 residents who have been admitted to the hospital.

The club also helps to identify candidates for a Rotary Peace Fellowship. One scholar is studying the effects of global warming on ocean water levels and corresponds regularly with the club to inform members of her experiences.

Despite all their good works in the community, a survey indicated that few people in the community are aware of the club's efforts. Some respondents reported they perceive Rotary as a social club for older men. This image of the club has made it difficult to attract new, younger, and diverse participants.

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

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*

The ROTARY ACTION PLAN

Rotary

TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. **The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.** To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the coming years.



- 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 channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

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

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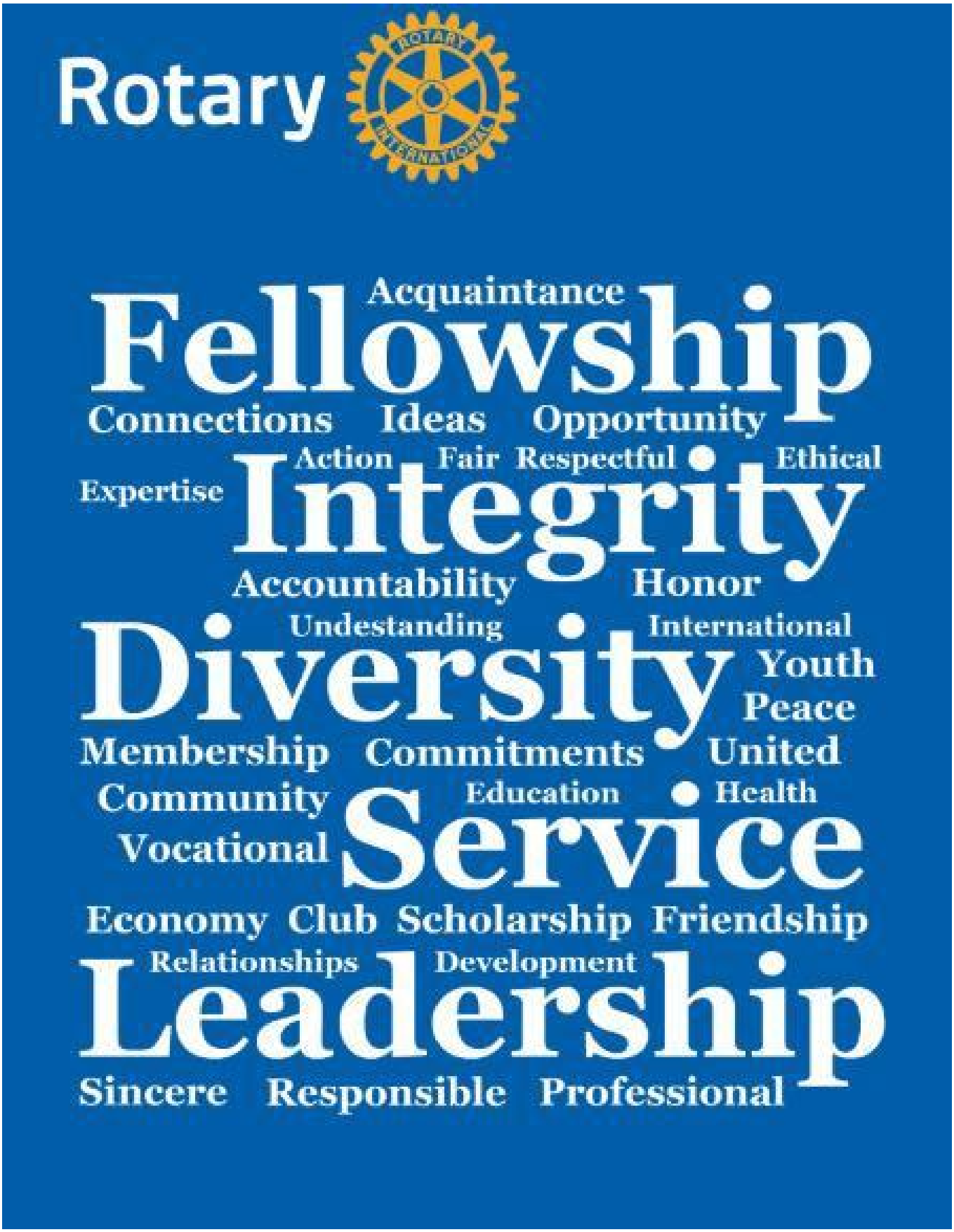
Rotary
Acquaintance
Fellowship
Connections Ideas Opportunity
Action Fair Respectful Ethical
Expertise
Integrity
Accountability Honor
Undestanding International
Diversity
Youth
Peace
Membership Commitments United
Community Education Health
Vocational
Service
Economy Club Scholarship Friendship
Relationships Development
Leadership
Sincere Responsible Professional

Building A Stronger Club



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

Session Goals:

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

Resources

- Tips for Increasing Membership https://www.rotary.org/en/tips-increasing-club-membership
- The Power of Belonging https://www.theflareapp.com/post/how-to-build-community-in-your-organization
- The Value of Rotary Volunteering https://www.rotary.org/en/value-rotary-volunteering

Topics:

1. Why did you join Rotary?

2. How do the Five Avenues of Service work with expectations?

3. How might Service projects meet member expectations?

4. What do the members in your club expect? What about prospective members?

Summary

- Strong Clubs are a result of planning and implementation

Guiding Principles of Rotary

Guiding principles

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

Object of Rotary

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

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

The Four-Way Test

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

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

Avenues of Service

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

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

IDEAS TO PERK UP CLUB MEETINGS AND EVENTS

Hold a speed networking event within the club to help members build relationships

Put aside one scheduled meeting per month to do service in the community

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

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

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

How Expectations Might Differ

Traditionalists Born before the Baby Boom (before 1946)

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

Baby Boomers Born between 1946 – 1964

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

Generation X Born 1965 – 1976

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

Millennials Born 1977 – 1997

- Technologically savvy and have a positive attitude towards tech-based activities
- Well educated and focus on large societal needs (as opposed to individual needs.
- Females outperform males for the first time
- Want to know the purpose of the meeting – not just a meeting because there has always been a meeting at this time.
- Willing and able to work collaboratively and expect this of others.

Generation Z Born After 1997

- The “smartphone generation.
- Just now getting into Rotary – but are active in Rotaract
- Diversity is a key element in their view …
- Want flexibility in the workplace … and for Rotary meetings
- Love to travel
- Money driven … and save money
- Good at setting boundaries – for work, for volunteerism.

Expectation & Delivery Exercise

Considering one group of the following in relation to your club, complete the table, using specific examples:
1. Current members; 2. Potential members; 3. Community; 4. Businesses; 5. Youth; 6. RI Organization; 7. Others?

List specific activities	Avenue of Service	Promise, Do, and Do Well	Promise, Do Poorly (minimal effort)	Promise, Set Expectations, But Don't Do	No Promise, No Expectations, Do	No Promise, No Expectations, Don't Do

Making a Difference

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

Session Goals:

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

Resources:

- RLI Course list for Parts 1, 2, and 3
- My RLI Personal Action Plan

Session Topics

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

2) Is RLI making a difference? For you?

3) What sessions worked the best? Why?

4) What ones should be improved? How?

5) What one thing would you change about RLI?

6) What did you expect to learn in RLI, but didn't?

7) Has RLI made a difference in your Rotary club? If not, why, and what can we do differently?

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

9) What burning question do you still have about Rotary that you want to know?

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.

RLI Core Courses

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

My RLI Personal Action Plan

Goal : Here is one thing I plan to do differently 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: _____