

*Find Your Passion in Rotary*



## **Lone Star Division RLI**

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

*2019-2020 Participant Materials*

**PART III**



# Lone Star Division RLI

Greetings RLI Part III Participants – and soon-to-be RLI Graduates!

Welcome back!

You are about to walk through a door of opportunity – Part III of RLI focuses on your Rotary Journey!

RLI helped shape my personal Rotary journey as I learned more about the broader world of Rotary and all the experiences and challenges Rotary offered. I loved my club – and still do – but the BIG world of Rotary was beyond my club! And I am forever indebted to those who carried the opportunity for me to explore Rotary through RLI. I hope you will feel the same way when you complete your RLI journey!

You will leave RLI as a Graduate, ready to serve as a stronger leader and I encourage you to use what you have learned both as the recognized leader as well as the internal leader. Use your eyes to see what should be, and then use your leadership skills to engage others in helping make what you see reality! You have a unique opportunity – in the words of Dr Seuss “Your mountain is waiting . . . so get on your way!”

Looking forward to “seeing” you all on “the road ahead” as you continue to share Your Passion in Rotary!

Best regards,

*Sherrí C Muníz*

Division Chair, Lone Star Division RLI

# RLI Part III – MY ROTARY JOURNEY

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**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.



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Course Evaluation

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# Strategic Planning



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

## **Session Goals**

Understand the Value and Process for Strategic Planning

Analyze Your Rotary Club

Review Possible Areas of Improvement

Discuss How Specific Improvements Should be Made

## **Materials**

◆ □ SPA-1: Strategic Planning Guide.

◆ □ SPA-2: Rotary Club Health Check

◆ □ SPA-3: Action Plan and Glossary

◆ □ SPA-4: FAQs

● □ Rotary Club Central <https://rcc.rotary.org/>

Key: ◆ attached insert    ● online    □ article

## **Session Topics**

*The focus is not to detail it in full but rather to highlight the four priorities and objectives.*

1. Rotary International suggests that clubs develop strategic plans. What is a strategic plan? Why do we need one? What are the benefits?
2. Using the Rotary Club Health Check, develop at least two three-year goals and an annual goal for each one. What strategy are you going to use to accomplish each goal? How can you insure accountability?
3. What is the process of creating a strategic plan? Is board, club, or key member “buy-in” more important? How often does the plan need to be reviewed? Can the plan be changed? How?

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

*"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

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

# STRATEGIC PLANNING GUIDE



# ROTARY'S 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.

## ABOUT THIS GUIDE

Just as a map guides people from one location to their destination, a strategic plan that is rooted in action guides an organization through achieving its goals and, ultimately, fulfilling its strategic vision. Strategic plans are important for Rotary and Rotaract clubs, too. Our survey results have shown us that clubs that develop and follow a strategic plan are stronger than clubs that don't because they have more satisfied members who view their clubs and Rotary more positively overall.

Use this Strategic Planning Guide to help you set long-term priorities as well as annual goals that support your club's strategic vision. This guide is designed for Rotary and Rotaract clubs, but districts may also find it useful.

## STRATEGIC PLANNING PROCESS OVERVIEW

<b>PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?</b>	<b>PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?</b>	<b>PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?</b>	<b>PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?</b>
<ul style="list-style-type: none"><li>• Identify strategic issues to address</li><li>• Determine club's strengths and weaknesses</li><li>• Assess member satisfaction and needs</li><li>• Identify opportunities and challenges in the community</li></ul>	<ul style="list-style-type: none"><li>• List five to seven characteristics you want your club to have</li><li>• Create a vision statement</li></ul>	<ul style="list-style-type: none"><li>• Set strategic priorities</li><li>• Set annual goals</li><li>• List the activities, timeline, and resources you'll need</li></ul>	<ul style="list-style-type: none"><li>• Monitor progress toward your annual goals</li><li>• If you missed your targets, determine why</li><li>• Adjust your action plans</li></ul>

## GETTING STARTED

- Assemble a strategic planning team made up of past, present, and incoming club leaders to develop the plan and make sure it's helping your club achieve its goals.
- Ask a non-Rotarian/Rotaractor or a club member that is not in a leadership position to facilitate strategic planning meetings.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision reflects Rotary's official strategic vision.
- Align your club's goals to reflect those of your district and Rotary's [strategic plan](#).

## PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?

Before you set your club's long-term goals, it's important to:

- Determine your club's strengths and weaknesses by gathering comments from members
- Identify opportunities and challenges in the community by meeting with other community leaders

### IDENTIFY STRATEGIC ISSUES

What are the critical issues or concerns that your club wants to address? Strategic issues are those critical unknowns that are driving you to embark on a strategic planning process. These are issues that are looking for a solution or decision. Think about what issues you want to address with this strategic plan.

Potential questions to ask your members:

- How will we increase our membership and engage members in our club?
- How can we attract a diverse group of members?
- How can we include more community members in our club activities?

### STRATEGIC ISSUES



Reviewing your club's past strategic plans and using the [Rotary Club Health Check](#) can help give you direction.

## STRENGTHS AND WEAKNESSES

List what your club does well and what your club could improve.

### STRENGTHS

### WEAKNESSES



## TIP

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get your members' insight and help you identify your club's strengths and weaknesses.

## IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

List the opportunities in your community that your club can act on. Maybe it's finding more members from a growing demographic group. Or mentoring entrepreneurs to help them develop their businesses. Also list the challenges in your community that your club can help address, such as unemployment or quality of education.

### OPPORTUNITIES

### CHALLENGES

## PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

### CLUB CHARACTERISTICS

Rotary's vision statement asks us to "unite and take action to create lasting change." List five to seven characteristics you want your club to have within three to five years that will help realize that vision, e.g. fun, service-oriented, innovative, representative of the community, etc.

### CHARACTERISTICS

### VISION STATEMENT

A vision statement defines your desired future and provides direction for what you want your club to be. Write a one-sentence vision statement with your strategic planning team using the list of club characteristics as a reference.

Potential questions to consider:

- What will our club look like in three to five years?
- How will we know we've succeeded?
- What do we want to achieve?

**TIP**



Your vision statement should resonate with club members. One example could be: "Our vision is to be recognized as the service club that supports youth in our community."

### VISION STATEMENT

# PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?

## STRATEGIC PRIORITIES

Your strategic priorities should help you achieve your vision. These priorities answer the question, “How will we succeed?” Develop your most important strategic priorities — those that will have the biggest impact as your club works toward its vision.

Consider the following when you develop strategic priorities:

- The Rotary vision statement and [strategic plan](#)
- Your club’s strengths and weaknesses
- Your district’s goals
- Your community’s opportunities and challenges
- Your club members’ opinions
- What you can achieve in three to five years

## STRATEGIC PRIORITIES

## ANNUAL GOALS

When you have set your strategic priorities, you can develop yearly goals that support them.

Write down your strategic priorities. Then list your annual goals, along with the actions you’ll take, the resources you’ll need, and who will lead the effort to meet each goal. Set a timeline for each. [Rotary Club Central](#) can also assist you in setting goals and tracking achievements.



**TIP**

Effective goals clearly state what, when, how, and who. They are also measurable.

**STRATEGIC PRIORITY 1:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

**STRATEGIC PRIORITY 2:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

**STRATEGIC PRIORITY 3:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

**STRATEGIC PRIORITY 4:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

## PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?

### MONITOR PROGRESS

You'll need to track progress toward your annual goals with your strategic planning team and suggest changes to action plans if needed. You may want to try a new approach or allocate more resources to your goals.

Consider the following when monitoring progress:

- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?



**Rotary Club Central**  
can assist you in  
tracking progress  
toward your goals.

### GOAL PROGRESS REVIEW PLAN

### REVIEW AND ADJUST

As you review the progress you've made, list your goals, including any goals that were not met and the reasons why. Determine what adjustments or actions should be taken to achieve those unmet goals.

Consider the following when identifying and listing your missed targets:

- What goals were met?
- What goals were not met?
- What are the top reasons we fell short of those goals?
- What adjustments need to be made to help us achieve those goals?

**STRATEGIC PRIORITY 1:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

**STRATEGIC PRIORITY 2:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

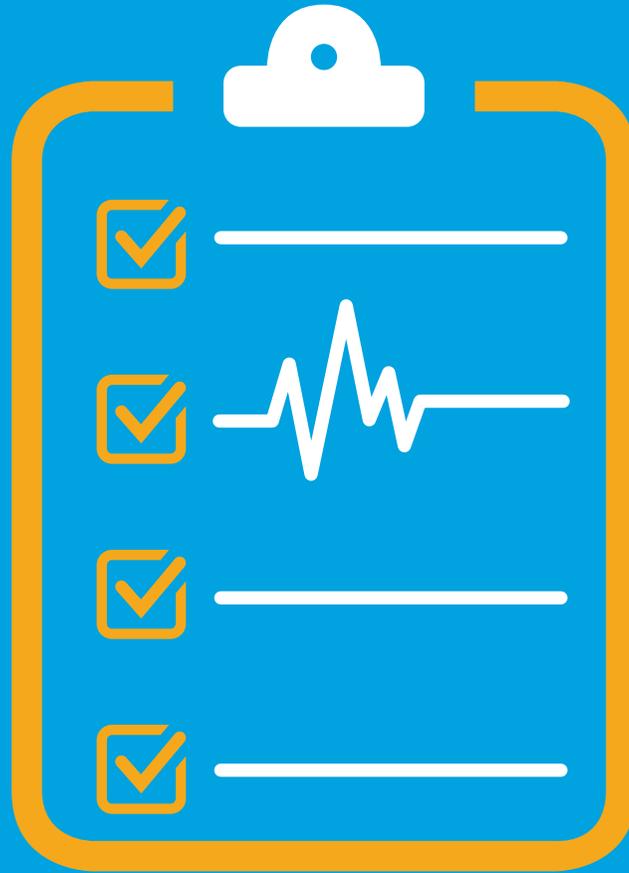
**STRATEGIC PRIORITY 3:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

**STRATEGIC PRIORITY 4:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

## Insert SAP-2: Rotary Club Health Check



# ROTARY 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.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.



## YOUR CLUB EXPERIENCE



Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary 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.
- Our club meeting programs are relevant, interesting, and varied.
- We have a greeter who welcomes members to meetings.
- Our meetings are organized and run professionally.
- Members sit at different tables each week to meet and talk to different people.
- Some of the members of my club are my close friends.
- Members other than club leaders participate in Rotary events at the district or international level.
- Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.
- Our members contribute to The Rotary Foundation.
- We raise funds in a way that allows members to contribute what they wish.
- We recognize members of the club or community at least monthly.
- I have made international connections through Rotary.
- Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

**SEE THE FOLLOWING PAGE  
FOR YOUR PROGNOSIS**





While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li data-bbox="597 569 1406 638">+ Change the meeting format or style. For ideas, see <b>Lead Your Club: President</b>, chapter 2, and <b>Be a Vibrant Club's</b> "Ideas to try."</li> <li data-bbox="597 680 1401 749">+ Find out what your members want using the <b>Member Satisfaction Survey</b> and then give them that experience.</li> <li data-bbox="597 791 1445 861">+ Develop leadership skills among club leaders and members by holding a <b>leadership skills training</b>.</li> </ul>
Rotary experience beyond the club	<ul style="list-style-type: none"> <li data-bbox="597 940 1362 1010">+ Sponsor an <b>Interact</b> or <b>Rotaract</b> club, <b>organize a RYLA event</b>, <b>create a scholarship</b>, or <b>start an exchange</b>.</li> <li data-bbox="597 1052 1252 1083">+ Join a <b>Rotary Fellowship</b> or <b>Rotarian Action Group</b>.</li> <li data-bbox="597 1125 1466 1194">+ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience.</li> <li data-bbox="597 1236 1463 1346">+ Promote the work that Rotary does globally, including polio eradication, by showing a short <b>Rotary video</b> or projects on <b>Rotary Showcase</b> during a club meeting.</li> </ul>

## SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple 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.

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- Our club holds regular get-togethers (aside from club meetings) for socializing and networking.
- Our club encourages members to bring partners, spouses, and family members to club meetings and events.
- Our club offers members leadership opportunities and professional development.
- Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.
- Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.
- We consult community leaders and community members to determine needs before choosing a project.
- We visit Rotary Ideas, an online project idea starter, before choosing a new project.
- Our club has a service project in progress.
- All members can give input on service and social activities.
- Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.
- Our club has applied for or used Rotary grant funds for a service project.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> <li>⊕ Sponsor an <b>Interact</b> or <b>Rotaract</b> club, <b>organize a RYLA event, create a scholarship, start an exchange</b>, join a <b>Rotarian Action Group</b>, or <b>support the Rotary Peace Centers</b>.</li> </ul>
Quality of projects	<ul style="list-style-type: none"> <li>⊕ Use <b>Community Assessment Tools, Guide to Global Grants</b>, and <b>Rotary Ideas</b> to improve the quality of your projects.</li> </ul>
Social activities	<ul style="list-style-type: none"> <li>⊕ Put one or two members in charge of organizing socials throughout the year.</li> <li>⊕ Join a <b>Rotary Fellowship</b>.</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>⊕ Hold a <b>leadership training</b>.</li> </ul>

## 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.

- 
- Our club has had a net increase in members in the past year.
  - Our club has had a net increase in female members in the past year.
  - Our club has had a net increase in members under age 40.
  - Our club seeks to recruit members from professions in the community that are underrepresented in the club.
  - Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).
  - Our club actively recruits Rotary alumni.
  - Our club actively recruits recently retired professionals.
  - Our club retains at least 90 percent of its members each year.
  - At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
  - Our club has a process for soliciting feedback from members.
  - A designated person checks and follows up on membership leads assigned to the club.
  - Guests are asked to introduce themselves and are invited back.
  - Member benefits are explained and promoted to new and continuing members.
  - New members are provided with an orientation and opportunities to get involved.
  - Newer and seasoned members are paired for mentoring relationships.
  - We ask members to speak at meetings about their vocations or other topics of interest.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> <li>⊕ Take action to diversify your club using <b>Diversifying Your Club: A Member Diversity Assessment</b>.</li> </ul>
Professional diversity	<ul style="list-style-type: none"> <li>⊕ Make your club a microcosm of your community with <b>Representing Your Community's Professions: A Classification Assessment</b>.</li> </ul>
Stagnant or declining membership	<ul style="list-style-type: none"> <li>⊕ Create a membership development plan with <b>Strengthening Your Membership</b>.</li> <li>⊕ <b>Connect to Membership Leads</b> assigned to your club using <b>How to Manage Membership Leads (For Clubs)</b> and <b>resources for prospective members</b>.</li> <li>⊕ Target prospective members using this <b>exercise</b>.</li> <li>⊕ Show members how to <b>propose new members</b> to their own club and explain that they can <b>refer</b> qualified prospects to other clubs.</li> </ul>
Members leaving	<ul style="list-style-type: none"> <li>⊕ Start with the <b>Member Satisfaction Survey</b> to enhance current members' experience.</li> <li>⊕ Learn and act on trends using the <b>Retention Assessment and Analysis</b>.</li> <li>⊕ Use the <b>Exit Survey</b> to understand why members resign.</li> <li>⊕ Let resigning members know they can <b>rejoin or change clubs</b> when they are ready.</li> </ul>
Orientation and Rotary knowledge	<ul style="list-style-type: none"> <li>⊕ Offer <b>new member orientation, leadership development</b>, and ongoing learning opportunities with Rotary's <b>Learning Center</b>.</li> </ul>

## IMAGE



Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

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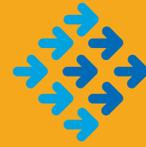
- We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.
- Our club has members dedicated to public image and outreach.
- Our club appeared in the local media multiple times last year.
- We promote our club and Rotary through various media in the community.
- Our club invites members of the media to cover our service work.
- Our club materials follow Rotary's updated branding guidelines.
- We use branded materials and templates from Rotary's Brand Center.
- We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.
- We display Rotary signs and banners at our meeting place.
- Our club's presence is known in our community.
- We have a customized brochure that we give to community members and prospects.
- We use Rotary Showcase to promote our finished projects.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> <li data-bbox="597 533 1380 604">+ Use the resources in Rotary's <b>Media Center</b> and use them in your community's media.</li> <li data-bbox="597 646 1469 718">+ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's <b>Brand Center</b>.</li> </ul>
Outdated materials	<ul style="list-style-type: none"> <li data-bbox="597 793 1448 865">+ Find customizable club brochures and membership materials on Rotary's <b>Brand Center</b>.</li> <li data-bbox="597 907 1448 978">+ Follow the <b>Voice and Visual Identity Guidelines</b> in any materials your club creates.</li> <li data-bbox="597 1020 1386 1092">+ Use <b>Rotary Images</b> and <b>Rotary videos</b>, as well as images of your members, in your materials.</li> </ul>
Online presence	<ul style="list-style-type: none"> <li data-bbox="597 1163 1438 1234">+ Find a tech-savvy member to create and manage your club website and social media pages.</li> <li data-bbox="597 1276 1237 1310">+ Take the social media course in the <b>Learning Center</b>.</li> <li data-bbox="597 1352 1458 1423">+ Use <b>Rotary Images</b> and <b>Rotary videos</b>, as well as images and videos of your own members.</li> <li data-bbox="597 1465 1110 1499">+ Share your projects on <b>Rotary Showcase</b>.</li> </ul>
Marketing expertise	<ul style="list-style-type: none"> <li data-bbox="597 1570 1403 1642">+ Find tips in <b>Lead Your Club: Public Relations Committee</b> and put members with public relations expertise on the committee.</li> <li data-bbox="597 1684 1445 1755">+ Recruit professionals with marketing expertise using ideas from <b>Finding New Club Members: A Prospective Member Exercise</b>.</li> <li data-bbox="597 1797 1429 1869">+ Build your own social media expertise using the Social Media Toolkit in Rotary's <b>Brand Center</b>.</li> </ul>

## BUSINESS AND OPERATIONS



When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

- 
- We have a strategic plan for our club that we update regularly.
  - We have annual goals and enter them in Rotary Club Central.
  - Our club has committees that support the activities and regularly report to the club board on progress toward goals.
  - Our club board changes what isn't working well and updates club bylaws accordingly.
  - We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
  - Our club president attends PETS, and club leaders attend the district training assembly.
  - Members attend district events and seminars on Rotary topics that interest them.
  - New members are officially inducted and are presented with appropriate materials.
  - At least half of our club's members have a My Rotary account.
  - Club officers conduct Rotary business using My Rotary or integrated club software.
  - 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.
  - We offer ongoing learning opportunities for our members.



Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of 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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> <li>⊕ Create a vision for your club and set long-range and annual goals using the <b>Strategic Planning Guide</b>.</li> <li>⊕ Track your annual goals in <b>Rotary Club Central</b>.</li> <li>⊕ Use <b>Strengthening Your Membership</b> to make a membership development plan.</li> </ul>
Innovation	<ul style="list-style-type: none"> <li>⊕ Ask members for input using the <b>Member Satisfaction Survey</b>, and try their ideas. If they're successful, edit your club bylaws accordingly.</li> <li>⊕ Use templates in the <b>Brand Center</b> to create your own materials.</li> </ul>
Processes	<ul style="list-style-type: none"> <li>⊕ Develop standard processes for <b>new members, prospective member follow-up, proposing a new member</b>, leadership continuity, etc.</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>⊕ Find tips and resources in Lead Your Club: <b>President, Secretary, and Treasurer</b>.</li> <li>⊕ Offer leadership development opportunities and promote self-paced learning with Rotary's <b>Learning Center</b>.</li> </ul>
Managing funds	<ul style="list-style-type: none"> <li>⊕ Use <b>The Rotary Foundation Reference Guide</b> to learn about giving options.</li> <li>⊕ Find best practices in <b>Lead Your Club: Treasurer</b>.</li> </ul>
Managing your club on MyRotary	<ul style="list-style-type: none"> <li>⊕ Use the <b>Club Administration</b> section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.</li> </ul>

## WHAT'S NEXT?



Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check 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, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

---

### FEATURED RESOURCES

#### Membership Assessment Tools

#### Membership resources

#### Brand Center

#### Learning Center

#### Rotary videos



## Insert SPA-3: Action Plan and Glossary

# HOW TO TALK ABOUT OUR ACTION PLAN

Like the People of Action who inspired it, Rotary's plan for the future is bold.

This glossary will help all of us at Rotary speak about our goals with one voice and one vocabulary so we can move forward and act as one.

### VISION

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

### ACTION PLAN

The name for our five-year strategic plan, including four strategic priorities and 14 objectives.

### PARTICIPANTS

All Rotary members and other individuals who engage in Rotary activities.

### STRATEGIC PRIORITIES

#### INCREASE OUR IMPACT

Define, measure, track, and capture data from service projects to measure our impact, improve project quality, and create lasting change.

#### EXPAND OUR REACH

Develop new models of engagement to attract diverse Rotary participants and unite them in taking action.

#### ENHANCE PARTICIPANT ENGAGEMENT

Create new ways to inspire participants and provide valuable experiences that make them want to stay.

#### INCREASE OUR ABILITY TO ADAPT

Make Rotary's operating and governance structures more efficient, representative, flexible, and effective.

### OBJECTIVES

The specific things we want the *Action Plan* to accomplish.

### INITIATIVES

The actionable steps to achieve each objective. The Secretariat, with oversight from the Strategic Planning Committee, is responsible for accomplishing them.

#### INPUTS

The resources invested in a program.  
*Example: The materials used in a literacy program.*

#### OUTPUTS

The immediate results of a program.  
*Example: The number of people who complete a literacy program.*

#### OUTCOMES

The short-term or intermediate results of a program.  
*Example: The number of people who gain reading proficiency in a literacy program.*

#### IMPACT

The long-term effects or end results of a program.  
*Example: The changes in education outcomes for the community.*

Be part of the plan:  
[myrotary.org/strategicplan](https://myrotary.org/strategicplan)



# Insert SPA-4: FAQs

## Action Plan Frequently Asked Questions

### **Q: Why does Rotary have a new Action Plan?**

A: The world today is not the same as it was when Rotary began in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary: fellowship, integrity, diversity, service, and leadership. With our new plan, we will honor our past and embrace our future. We can evolve and keep Rotary not only relevant but thriving.

### **Q: How were the new Rotary vision statement and Action Plan developed?**

A: Rotary's new 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 was created by using the input and feedback from Rotary members, former members, Rotaractors, alumni, Youth Exchange students, Rotary staff, and the general public. In all, over one million people across the world were asked to share their insights with the Strategic Planning Committee through surveys and focus groups. The result is a statement that inspires and engages while setting the pathway for the future of our organization. The vision was approved by the Rotary Board of Directors and Board of Trustees in June 2017.

Shortly after the vision statement was adopted, the Committee began developing Rotary's new Action Plan. Again, the Committee invited reactions and input from Rotary members; over 582 people from 28 different countries participated in focus groups and interviews to provide feedback. In June 2018, both boards approved the strategic priorities and objectives that make up the new Action Plan.

### **Q: What is the Action Plan and how does it affect members?**

A: The Action Plan is intended to guide activities at the corporate level, but as clubs and districts are the core of Rotary, they are strongly encouraged to develop their own action plans and align them with Rotary's new plan. The world is changing rapidly and to continue thriving in the years ahead, Rotary must evolve. This plan is intended to help us honor our past and embrace our future by guiding our organization, members, and supporters toward projects, opportunities, and activities that support our vision.

### **Q: How will the new Action Plan be rolled out?**

A: The new plan is being rolled out throughout the 2019–2020 Rotary year. We are committed to full transparency in sharing information about how the new plan's components may or may not affect clubs and how they will be asked to support the strategic priorities. Take a look at the main page to learn more about the overall Action Plan and how you can help. In the coming months, you will receive information on additional initiatives being undertaken to achieve the objectives in the plan and how clubs and districts can get involved.

## **Q: What are clubs and districts supposed to do with the new Action Plan?**

A: We want to make sure that all clubs and districts know that this new plan was shaped by the input of Rotary members, and that it lays the foundation for new and exciting opportunities for the organization. Read through the Action Plan on the main page, and think about how you can help Rotary achieve its goals. Encourage your clubs and districts to talk about and share the new plan. Help Rotary members begin to see for themselves how they can be a part of this team effort.

## **Q: What is Rotary doing to address the environment and how is this incorporated into the Action Plan?**

A: Our research has shown that Rotarians, Rotaractors, and alumni prioritize the environment as an important cause globally. We recently completed an extensive evaluation of our current areas of focus. The evaluation determined that Rotary already supports a substantial body of environment-related projects through our existing Areas of Focus. In fact, over the past five years, Rotarians have invested \$18 million in global grant funding in support of such projects. The most active areas of global grant investment are in the WASH sector and in Community Economic Development. The Board of Trustees chose to add components that relate to the environment to each area of focus and to specify actions that members can take in global grants for environmental protection. The updated Area of Focus policy statements can be found on My Rotary.

We know that there are more opportunities for club members and anyone who interacts with our programs to engage with environmental causes. Recognizing the potential that expanding our work to protect the environment can have to drive our strategic priorities of increasing our impact and expanding our reach, we are currently reviewing ways to give our participants even more ways to engage with environmental causes. In October, the Trustees appointed a task force to discuss possibilities for furthering our work on environmental sustainability in our Area of Focus portfolio.

## **Q: How are Rotaract clubs affected by the new plan? What is Rotary doing to include and elevate Rotaract in its new strategy?**

A: The 2019 Council on Legislation formally recognized Rotaract clubs as a membership type of Rotary International and elevated Rotaract within the organization. An appointed task force is conducting and reviewing research on opportunities to further engage Rotaractors and will make recommendations about the future structure of Rotaract within the organization. A communications plan is being developed to provide more information on decisions related to Rotaract and to update members on progress. In the meantime, we are also working to ensure that the tools and resources available for use by Rotarians are equally available and accessible for Rotaractors.

## **Q: What is meant by “new channels into Rotary” and “new participant models of engagement”?**

A: In order for us to expand our reach and attract additional leaders and people of action into our organization, we know that we need to explore and adopt new, effective models and ways for people to engage with Rotary. These models could take a variety of forms, from events to service opportunities to online engagement with clubs or the overall organization. Whatever forms these new channels and models ultimately take, our strategic focus is on creating and perfecting ways for participants – anyone who interacts with our programs, events, clubs and offerings – to have opportunities to grow personally and professionally, collaborate with diverse people, and participate in volunteering and service experiences, even without necessarily joining a club. These models will be piloted and tested to so that we learn from and make adjustments to ensure challenges are addressed before a full launch.

## **Q: How can this strategy be successfully implemented with annual turnover for most leadership positions in Rotary?**

A: The turnover cycle in leadership positions has long represented a significant challenge for Rotary to implement long-term strategies. However, work at the international level to bring together current and incoming leaders and work at the local level to encourage continuity in planning has shown that collaboration and communication are the keys to maintaining a strategic perspective over time while also allowing new leaders to gain experience and serve. It is also helpful for clubs and districts to align their own strategic plans with the Action Plan so that we can all work together towards the same goals.

## **Q: What can clubs do to support and advance the Action Plan?**

A: One of the most important things clubs can do to support the Action Plan is to develop their own strategic plan that aligns to and reflects the priorities and objectives of the new strategy. Research shows us that clubs with strategic plans are more successful in engaging their members. You can utilize the Strategic Planning Guide, available on My Rotary, to assist you with the process. We will also be providing more information on actions clubs can take to help drive our priorities forward over the coming months.

# Foundation III: International Service



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

## ***Session Goals***

Discover how I, as an individual Rotarian, can contribute to International Service

Exchange ideas supporting why my club should be involved in International Service

Explore ideas for International Service projects

## ***Inserts & Online Materials***

- ◆ **Insert IS-1:** Good to Know for International Service
- ◆ **Insert IS-2:** Suggested Steps in Developing an International Service Project
- ◆ **Insert IS-3:** District International Service Chair
- ◆ **Insert IS-4:** Get Connected - Network Internationally
- ◆ **Insert IS-5:** Bringing it Together in International Service

Key:     ◆     attached insert     ●     online

## ***Session Topics***

- 1) In Rotary, what is International Service?
- 2) What is the goal of International Service?
- 3) Why shouldn't we just concentrate on our local community?

### **What makes a service project effective?**

Effective service projects do more than just offer a quick "fix" to problems. Typically, Rotary's most effective service projects:

- Respond to real issues
- Improve community members' lives
- Incorporate the abilities of those who are served
- Recognize the contributions of all participants as important and necessary
- Are based on a realistic assessment of available resources
- Aim for specific goals and objectives with measurable results
- Build effective networks
- Empower people and communities

From *Communities in Action 605-pg 2*

- 4) International Project Development Plan
- 5) International Service can be with the Rotary Foundation support or without. What are the advantages of each?
- 6) How can:
  - a. Your Rotary District be a resource for International Service?
  - b. You use your particular vocational skills in International Service?
  - c. An International Service activity fulfill your obligation (commitment) to the Object of Rotary?
- 7) How can you excite other Rotarians in your club to the excitement and reward of international service?

*Rotarians in one part of the globe can affect lives on the opposite side of the world. We have the desires and the capabilities to give help where help is needed ... Where there [is] ... a starving child ... a weeping mother - Rotary can be there. Where there is a cataracted eye, a crooked limb — a need for medicine, braces, surgery — Rotary can be there. Where there is the sigh of the lonely, the despair of the isolated — Rotary can be there.*

*Rotary is the sanctity of fellowship, the love of brotherhood, the warmth of trust. Rotary is a vision — yet struck in stone. We build not only in concrete, but also in lives and futures.”*

*Past RI Pres. Edward Cadman  
— Address to 1985 Rotary Convention, Kansas City, Missouri, USA*

## **Insert IS-1: Good to Know for International Service**

An International Service Project involves Rotary clubs from two or more countries uniting to serve one of their communities. Clubs searching for international assistance can publicize their project needs via the web to other clubs around the world. Likewise, clubs looking to support an international project can use web resources to locate a suitable candidate.

By advancing international understanding and goodwill through service, International Service Projects reflect the heart of Rotary and provide exciting, challenging, and rewarding opportunities to Rotarians.

### **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. Educate Rotarians about **project funding opportunities** available through the Foundation and other sources
7. **Communicate** successful project experiences to other Rotarians
8. Foster **international understanding, goodwill, and peace**

### **Getting Involved**

Rotary clubs that get involved find that the 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. The searchable databases and crowdfunding platforms, available at [my.rotary.org/en/take-action](http://my.rotary.org/en/take-action) 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.

Excerpted from World Community Service Handbook: a Guide to Action. 742-EN-(908), modified by RLI

## **Insert IS-2: Suggested Steps in Developing an International Service Project**

1. Get ideas from Rotary Web Site (Rotary Showcase) or people who have visited a foreign country. ([my.rotary.org/en/take-action](http://my.rotary.org/en/take-action))
2. Try to select something important that will interest the club members.
3. Present the idea to the club's International Service Committee who will report to the Board of Directors.
4. Contact your District International Service Chair for early support.
5. If approved, make contact with Rotary club or district in the target country to seek cooperation. The local club, with your assistance, will conduct a “needs assessment” and “sustainability assessment”.
6. Get estimates of project cost with cooperation of partner club/district.
7. Consider if visit to other country desirable/necessary. If so, discuss ways of financing travel.
8. Develop budget for project with partner club/district. Estimate source of funds - sponsor club, district contribution, partner club, grant funds, outside support, etc.
9. Get approval of budget by all sources of support and begin preparation of grant applications.
10. Process Foundation Grant Model applications (if applicable) and execute project.
11. Keep club informed of progress of project. Have pictures taken, etc. for publicity within district, to outside media, etc.
12. Thank those who supported project.
13. Send Grant Reports as required.

# DESIGN BIGGER & BETTER PROJECTS

With help from your district international service chair and the experts in the district resource network, you'll design projects and grants that will have lasting benefits for the community.



TAKE THE FIRST  
STEP TO PLANNING  
SUSTAINABLE, SUCCESSFUL  
PROJECTS  
& GRANTS

USE THE EXPERTS AND RESOURCES  
AVAILABLE IN YOUR DISTRICT.



# DISTRICT INTERNATIONAL SERVICE CHAIR

## MAINTAINS

the district resource network, a database of local experts who can provide guidance and technical expertise

## MOTIVATES

clubs to get involved in international service

## HELPS

clubs find international partners

## PROMOTES

Rotary publications, online tools, and strategies for planning effective projects and grants

## COLLABORATES

with district leaders to recruit local experts to join the district resource network



RLI Curriculum—Part III  
(LSRLI Rev. 6/20)

## DISTRICT RESOURCE NETWORK

Available on your district's website or through your district international service chair.

Experts in project planning, Rotary's areas of focus, and Rotary grants, including: ROTARIANS · ROTARY PROGRAM ALUMNI · COMMUNITY MEMBERS · PROFESSIONALS FROM PARTNERING ORGANIZATIONS



## PUBLICATIONS

Available on My Rotary

COMMUNITY ASSESSMENT TOOLS · GUIDE TO GLOBAL GRANTS · LEAD YOUR CLUB: SERVICE PROJECTS COMMITTEE



## ONLINE TOOLS

Available on My Rotary

ROTARY SHOWCASE · ROTARY IDEAS · DISCUSSION GROUPS

## Insert IS-4: Get Connected – Network Internationally

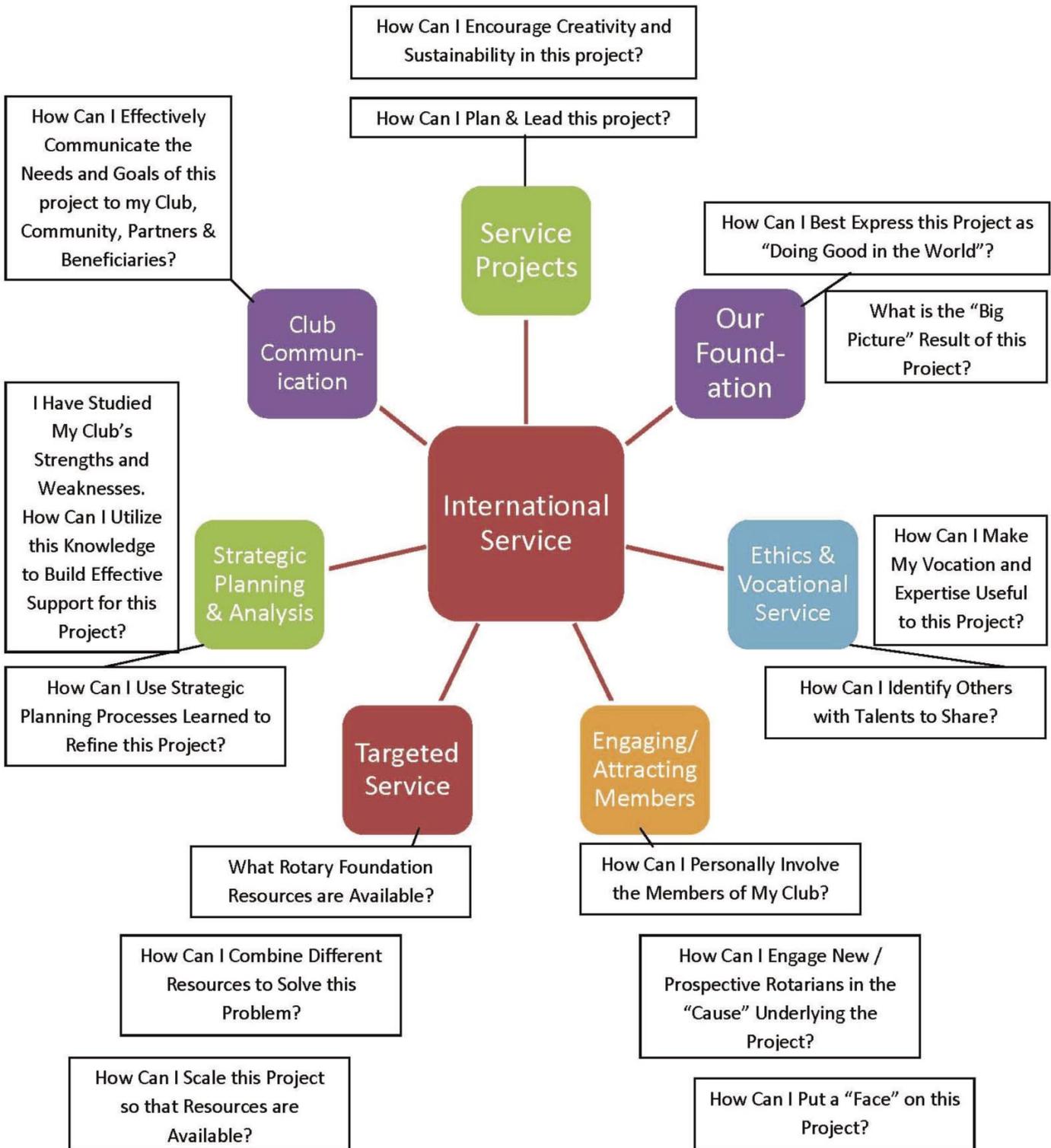
# GET CONNECTED!

Make your Rotary experience truly international with these networking opportunities.

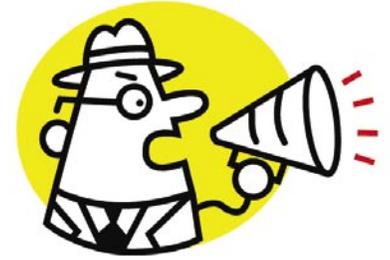


EXCHANGE IDEAS: [www.rotary.org/myrotary](http://www.rotary.org/myrotary)

# Insert IS-5: Bringing It Together in International Service



# Public Image and Public Relations



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

## Session Goals

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

Explore how my club can benefit from a Public Relations Strategy

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

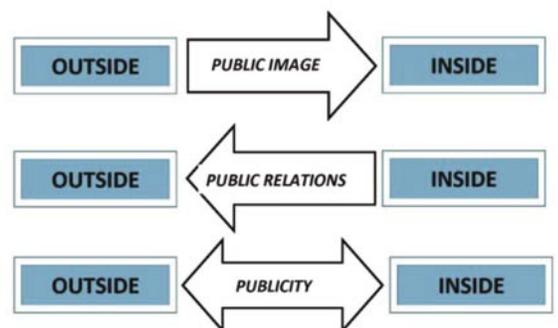
## Inserts & Online Materials

- ◆ **Insert PIPR-1:** Public Relations Case Study
- ◆ □ **Insert PIPR-2:** Public Relations Writing
- Visual Identity Guide (Login required)  
<https://brandcenter.rotary.org/en-GB/Guidelines>
- Rotary Logos (Login required)  
<http://brandcenter.rotary.org/en-GB/logos>
- <https://my.rotary.org/en/learning-reference/learn-topic/public-relations>

Key:     ◆ attached insert     ● online     □ article

## Session Topics

- 1) Who is the club's target Audience?
  
- 2) What is the difference between Publicity, Public Relations, and Public Image?  
Which one might we have more control over?



- 3) Discuss the following tools for internal and external communication?
  
- 4) Case Study PIPR-1
  
- 5) Is there something about your club that the community recognizes? Is it different from the brand of Rotary International? Discuss Rotary's "new" logo and the value of including it on all communications.
  
- 6) In many communities very few people even know a Rotary Club exists. How can our clubs do better at public relations?
  
- 7) Does your club have a PR chair? What is their role? Is there a PR strategy? Are projects and activities designed with PR in mind? How can club members be part of the PR strategy?

## Insert PIPR-1: Public Relations Case Study

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

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

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

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

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

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

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

## Insert PIPR-2: Public Relations Writing

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

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

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

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

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

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

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

*Excerpted from [www.Rotary.org](http://www.Rotary.org)*

# Building A Stronger Club



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

## **Session Goals**

Examine the varying expectations of Rotary

Explore the consequences of met and unmet expectations

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

## **Materials**

◆ ● Insert BSC-1: Guiding Principles of Rotary

◆ □ Insert BSC-2: Expectation & Delivery Exercise

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

Key: ◆ attached insert    ● online    □ article

## **Things to Think About**

- 1) What is meant by Rotary's promise? Discuss?
- 2) What types of specific or general expectations are set, if any, in your club? discuss this issue for one of the groups identified in the prior question and complete the Expectation and Delivery Exercise.
- 3) Consider how your club might meet these expectations through each of the five Avenues of Service. What is my role in doing this?

4) Is there a disconnect between what is promised and what is delivered?

5) List three activities that my club can realistically do to meet the expectations of one group that is important for your club.

6) In light of this discussion, how can I make my club stronger?

# Insert BSC-1: Guiding Principles of Rotary

## Guiding principles

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

## Object of Rotary

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

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

## The Four-Way Test

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

Of the things we think, say or do

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

## Avenues of Service

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

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



# Making a Difference



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

## ***Session Goals***

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

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

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

## ***Materials***

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

Key:    ◆ attached insert    ● online    □ article

## ***Session Topics***

- 1) What RLI Sessions were most memorable to you individually, and why?
  
  
  
  
  
  
  
  
  
  
- 2) Has RLI made a difference in your Rotary club? If not, why, and what can be done to change things so that RLI is making a difference in your club?
  
  
  
  
  
  
  
  
  
  
- 3) What are some of the issues facing Rotary and your club that can be improved through the use of ideas, skills or techniques used in RLI?

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

5) Is RLI making a difference?

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

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

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

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

10) Complete the Personal Action Plan.

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

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

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

*—Past RI Director & RLI Founder  
David Linett*

**CONGRATULATIONS, GRADUATES!**  
***Want more? RLI has a Graduate program with courses on specific topics just for graduates:  
Visit [www.LoneStarRLI.org](http://www.LoneStarRLI.org) for more information on current course offerings.***

## Insert MD-1: RLI Undergraduate Courses

	<b>RLI Curriculum</b>
<b>Part I</b>	My Leadership In Rotary My Rotary World Ethics and Vocational Service Foundation I: Our Foundation Engaging Members Creating Service Projects
<b>Part II</b>	Rotary Opportunities Effective Leadership Strategies Attracting Members Club Communication Foundation II: Targeted Service Team Building
<b>Part III</b>	Strategic Planning Public Image & Public Relations Building A Stronger Club Foundation III: International Service Making a Difference

## Insert MD-2: My RLI Personal Action Plan

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

SMART Objective: \_\_\_\_\_

S pecific \_\_\_\_\_

M easurable \_\_\_\_\_

A chievable/Agreed to \_\_\_\_\_

R ealistic/Result-oriented \_\_\_\_\_

T ime-framed (goal attainment date) \_\_\_\_\_

Action Steps to take to achieve this goal:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Additional Training or Knowledge I may need: \_\_\_\_\_

\_\_\_\_\_

How I plan to celebrate my success! \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_