



A Joint Project of over 400 Rotary Districts worldwide

2023-25

PARTICIPANT - PART I

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

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

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

2023-2025 RLI Curriculum Committee

This workbook edition has been modified and is presented for use in member districts of the Lone Star Division RLI and the Rocky Mountain Division RLI. The revision date is noted as a footer to each numbered page.

RLI Part I – THE ROTARIAN

TABLE OF CONTENTS

The Rotary Leadership Institute (RLI) is a 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.



My Leadership in Rotary

4

As a Rotarian, I am, by definition, a leader. Join us as we explore the characteristics of leadership, motivational techniques, and leadership styles. How do I best lead?



My Rotary World

7

As a Rotarian, I am part of a worldwide organization of like-minded people. Take some time to truly understand the purpose and structure of Rotary. Can these resources help me?



Ethics and Vocational Service

14

I am ethical, recognize and promote ethics in others, and seek opportunities to serve through my vocation. You can see that I am a Rotarian.



Foundation I: Our Foundation

19

I am "doing good" in my local community and around the world. Learn about the basic goals and programs of our Foundation. I am a force for good in the world!



Engaging Members

24

I make my club and Rotary stronger by my active participation. Engaged club members have fun, make friends, and effectively serve. This is why I joined Rotary!



Creating Service Projects

34

I am a vital part of a worldwide service organization of business, professional and community leaders meeting needs in communities. I can build, run and promote service.

My Leadership in Rotary



As a Rotarian, I am, by definition, a leader.

Good leadership requires thought, planning, preparation, responsibility, and a willingness to try something new, not being bound by the past, and the confidence to take risks.

RLI believes that while there are certain innate qualities a person brings to leadership, that leadership can be taught in the sense that a person can improve their leadership skills.

Session Goals:

Explore the Characteristics of Leadership

Review Leadership Styles

Examine how your leadership style relates to other leaders in your club and to the needs of your Rotary Club

Resources

- The Basics for Effective Leadership Are Really Pretty Basic PDF
[Basics of Leadership 1.pdf \(rlifiles.com\)](#)
- 12 Leadership Essentials for the 21st Century PDF
http://rlifiles.com/files/resource/12_Leadership_Essentials.pdf
- How to be an Effective Leader (Master Class)
[How to Be an Effective Leader: 8 Styles of Leadership - 2023 - MasterClass](#)
- Situational Leadership Model (Hersey & Blanchard)
<https://www.toolshero.com/leadership/situational-leadership-hersey-blanchard/>

Session Activities

1. What are the characteristics of good leadership?
2. Which are the most important?
3. Which are the most important for business?
4. Which are the most important for Rotary or a volunteer organization?
5. Why are they different?
6. If all Rotarians are leaders, does our personal leadership matter?

Some leadership types:

Participative:

Situational:

Transactional:

Transformational:

Servant:

1. Which type of leadership do you think would be most successful in your club?
2. How can you apply this information in your club or to yourself?

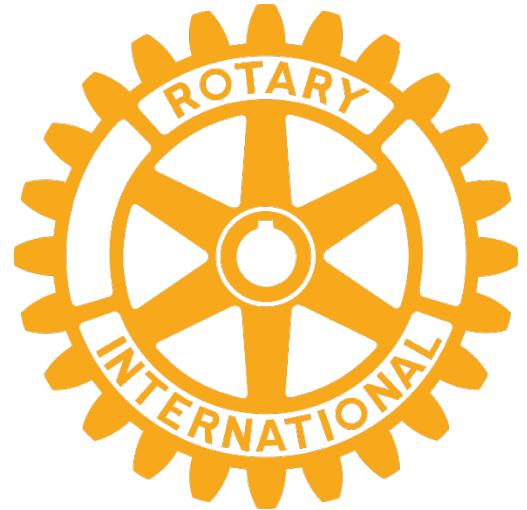
Summary:

- Leadership is a learned skill and a personal choice.
- Leadership requires thought, planning, preparation, and a willingness to try something new.
- Leading volunteers can be different than leading employees.

In Part II under team building, we will develop further qualities and characteristics of volunteer leadership.

My Rotary World

I am a vital part of a worldwide organization of like-minded people.



Session Goals:

Review the purpose of Rotary.
Learn about Rotary's organizational structure.
Understand the Vision and Strategic Priorities.

Resources

- RI Action Plan 2021-24
<https://my.rotary.org/en/learning-reference/about-rotary/action-plan>
<https://my.rotary.org/en/document/action-plan-flyer>
- The Object of Rotary Connect for Good
<https://www.rotary.org/myrotary/en/document/576>
- Rotary Basics
<https://my.rotary.org/en/document/rotary-basics>
- Rotary Governance Documents <https://my.rotary.org/en/learning-reference/about-rotary/governance-documents>
- Rotary Global History Fellowship (RGHF)
<https://rghf.org/>

Session Activities

1. Why did you join Rotary?
 2. What does Rotary believe in?
 3. How does this connect with why you joined Rotary?
-

1. How is Rotary structured?
2. Why does Rotary have this structure?
3. How can these people help you and your club?
4. How does the Rotary Foundation support the core values of RI?

True or False!

1. My club is autonomous.
What does your club have to do to remain a club?
What is the purpose of a club? What does it do?
2. My dues are used only for the benefit of my club.
Where does your money go?
3. I am a Rotarian. I belong to Rotary International.
4. The District exists to provide support for our club.
What does the district do for the clubs?
5. The Assistant Governor that visits our club is next in line to be the District Governor. What is the role of the AG?
6. I can access information about my District online.
Does your district have a website? Does your zone?
7. I am just a member. There isn't much on the RI website that is of value to me.
Who has been to the website?
What did you find there?
8. Zone tells the district what to do.
What does Zone do?
9. Rotary International tells the district what to do.
What does RI do?
10. When we are finished with this session. I will know everything about Rotary!
11. Where can I find answers?

Summary:

- The structure of Rotary serves the clubs and Rotarians.
- The Object of Rotary gives us all purpose.
- Support is available from all levels of Rotary.

ROTARY

ROTARY
INTERNATIONAL

Rotary



ROTARY
INTERNATIONAL

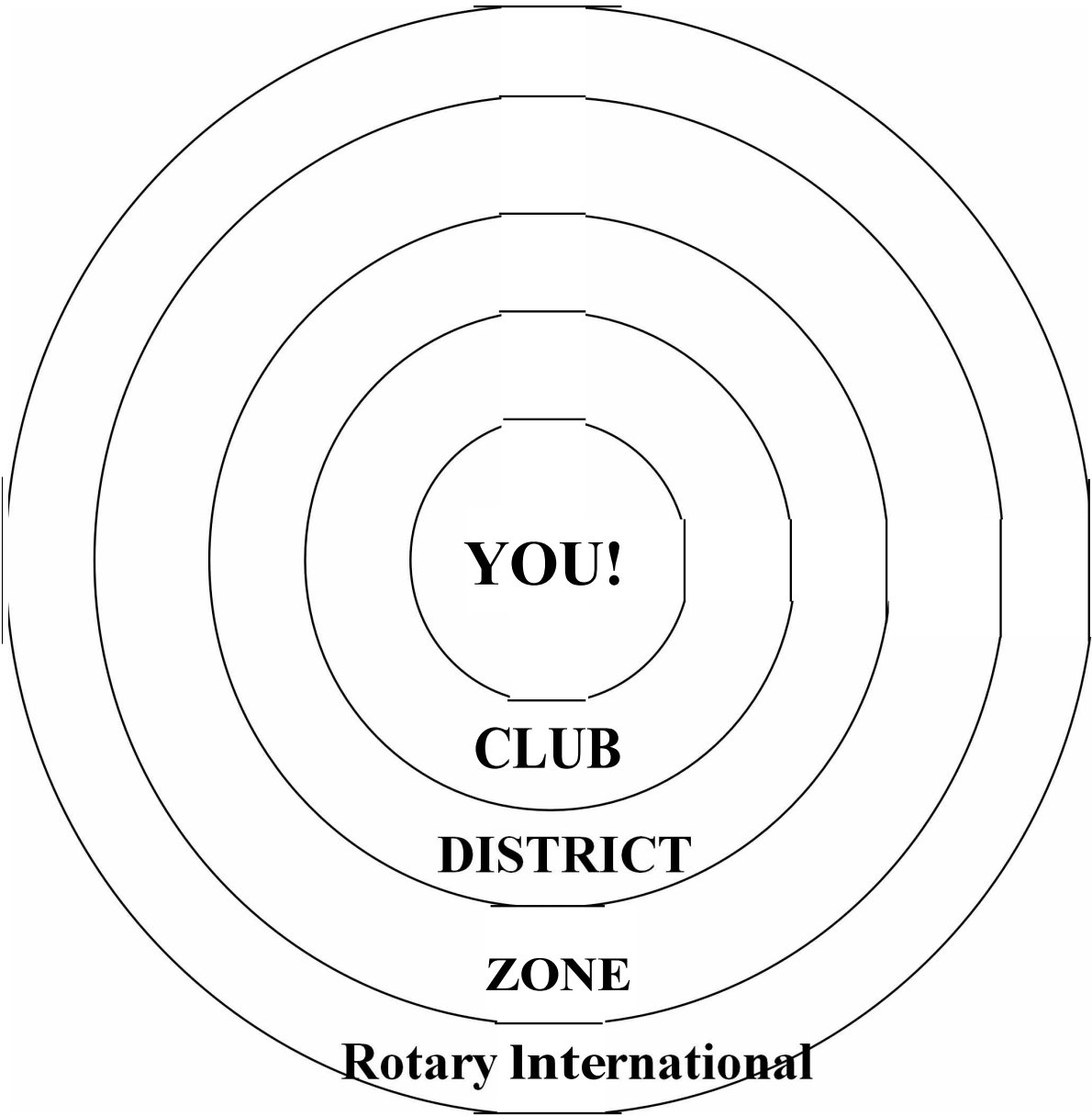
Object of Rotary

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:

- I. The development of acquaintance as an opportunity for service;*
- II. 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 service society;*
- III. The application of the ideal of service in each Rotarian's personal, business, and community life;*
- IV. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.*

INTERNATIONAL

Rotary Organizational Structure



The
Rotary
Foundation

Help at Every Level!

District

Governor
Assistant Governor

District Rotary Foundation Chair
District Public Image Director
District Membership Director
Other District Chairs!

Zone

Director
Assistant Rotary Coordinator
Regional Rotary Foundation Coordinator
Rotary Public Image Coordinator
End Polio Now Coordinator
Endowment and Major Gifts Advisers

Rotary International

President

General Secretary – John Hewko

Learning Center - online at www.rotary.org

Rotary Foundation Team

Branding Team

Council on Legislation (COL) and Council on Resolutions (COR)

Rotary Governance Documents - online at www.rotary.org

Rotary Constitution (updated by COL)

Rotary International ByLaws (updated by COL)

Standard Rotary Club Constitution (updated by COL)

Recommended Rotary Club ByLaws (changed by the club)

Rotary Code of Policies (updated after every RI board meeting)

Rotary Foundation Code of Policies (updated after every TRF board meeting)

Rotaract Club Constitution (updated by COL)

Recommended Rotaract Club ByLaws (changed by the club)

Manual of Procedures (updated by COL)

Ethics & Vocational Service

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



Session Goals:

- Examine the concept of Vocational Service and why it is important to Rotary Clubs
- Reflect on whether Rotarians can affect business ethics and how.
- Discuss how Rotary's Guiding Principles relate to our clubs and our lives

Resources

- The Four Way Test Means Business
<http://rlifiles.com/files/resource/>
- Applying the Four Way Test
[http://rlifiles.com/files/resource/Applying the Four Way Test.pdf](http://rlifiles.com/files/resource/Applying_the_Four_Way_Test.pdf)
- Organizing a Four Way Test Essay <http://www.4waytest.org>
- Guiding Principles of Rotary PDF
- Vocational Service Ideas PDF
- Rotary DEI Code of Conduct (2021) PDF
- *A Century of Service*, David Forward, published by Rotary International 2003 (book, can be purchased at Amazon & other locations)

Session Activities

1. Why is vocational service important? Or is it?
2. What role did vocational service play in the founding of Rotary?
3. Why do we have classifications?
4. Why are ethics important? Or are they?
5. How does being a Rotarian affect your business practices? Or does it?
6. How do ethics impact diversity, equity, and inclusion (DEI)?
7. Can Rotarians impact the ethics of their community? How?

Summary:

- Vocational Service is one of the major motivations for the founding of Rotary – to use our vocational and professional skills to benefit society.
- Clubs should make a point of utilizing the individual skills of its members in planning and executing its projects.
- Rotarians should be proactive in promoting and exercising the principles of the Object of Rotary and the guiding principles.

Guiding Principles of Rotary

The Object of Rotary

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

Rotary Code of Conduct

As a Rotarian, I will:

1. Act with integrity and high ethical standards in my personal and professional life.
2. Deal fairly with others and treat them and their occupations with respect.
3. Use my professional skills through Rotary to mentor young people, help those with special needs, and improve people's quality of life in my community and in the world.
4. Avoid behavior that reflects adversely on Rotary or other Rotarians.
5. Help maintain a harassment-free environment in Rotary meetings, events, and activities; report any suspected harassment; and help ensure non-retaliation to those individuals that report harassment.

The Four-Way Test

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

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

"Of the things we think, say or do:

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

Note: the 4 Way Test is not part of the RI Bylaws

The Five Avenues of Service

Based on the Object of Rotary, Rotary's Philosophical cornerstone and 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.

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

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 Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.

Rotary Diversity, Equity, and Inclusion (DEI) code of conduct (2021)

Rotary International's Board approved a new [DEI code of conduct](#) that reflects our core values. It provides a supportive framework for how Rotary members can create and maintain an environment that is collaborative, positive, and healthy for everyone.

The DEI code of conduct asks Rotary members to:

- Use respectful language
- Be supportive
- Foster a welcoming and inclusive environment
- Celebrate diversity

Although free expression is important, what we say and how we behave matter. Rotary does not tolerate speech or behavior that promotes bias, discrimination, prejudice, or hatred because of age, ethnicity, race, color, disabilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity.

All Rotary leaders, from club presidents and district governors to directors and trustees, are expected to apply the DEI code of conduct uniformly by taking responsibility for how their words and actions may affect others.

Vocational Service Ideas

1. Advancing high ethical standards in the workplace
 - a. In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
 - b. In internal communications, praise and encourage exemplary behavior on and off the job.
 - c. In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.
2. The classification principle
 - a. Classification talks to promote vocational awareness in your club.
 - b. Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
 - c. Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.
 - d. Schedule an occasional meeting in a member's place of employment.
 - e. Invite young people to special vocational meetings.
3. Promote Rotary's commitment to high ethical standards
 - a. Post The Four-Way Test on a prominent billboard in your community.
 - b. Display The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or work space and talk about it.
 - c. "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
 - d. Sponsor a Four Way Test essay contest.
 - e. Sponsor a joint "character literacy" project for young children.
 - f. Conduct a RYLA event with special emphasis on ethics.
 - g. Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.
4. Recognize and promote the value of all useful occupations
 - a. Make classification talks and business tours part of your club's program.
 - b. Join or form a Rotary Fellowship related to your vocation.
 - c. Sponsor a career day for Rotarians to bring young people to their businesses.
 - d. Support professional development
 - e. Encourage members to take leadership roles in business associations.
 - f. Sponsor a seminar for small business entrepreneurs.
 - g. Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
 - h. Start a career counseling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.
5. Volunteer your vocation
 - a. Mentor a young person.
 - b. Use Rotary Showcase to identify a project in need of your specialized vocational skills.

Foundation I: Our Foundation

The
Rotary
Foundation



I am Doing Good in my local community and around the world.

Session Goals:

- Understand the basic goals of our Rotary Foundation.
- Discuss the importance and value of having a foundation.
- Review and understand the Areas of Focus.
- Examine how you as a Rotarian can work with the Foundation.

Resources

- The Rotary Foundation Reference Guide 219 <https://my-cms.rotary.org/en/document/rotary-foundation-reference-guide>
- The Areas of Focus, Motto, and Mission of The Rotary Foundation PDF
- Charity Navigator website: <https://www.charitynavigator.org/ein/363245072>
- Rotary.org

Session Activities

1. What is the Mission of the Rotary Foundation?
2. Where does the money for the Foundation come from?
3. What are the different ways you can support the Foundation?

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

What is the motto of the Rotary Foundation?

Summary:

- The Rotary Foundation gives you the power to make big changes in the world!

The screenshot shows the Charity Navigator profile for The Rotary Foundation of Rotary International. The page includes a navigation bar with 'Sign in', 'Nonprofit Resources', and 'Support Charity Navigator'. The main header features the Charity Navigator logo and a search bar. The organization's name is prominently displayed, along with its address in Chicago and phone number. A '100%' rating is shown with four stars, indicating a 'Four-Star Charity'. The 'Rating Information' section on the left also shows a 'Great' rating with four stars. The right sidebar lists various performance metrics such as 'Impact & Results', 'Accountability & Finance', 'Culture & Community', and 'Leadership & Adaptability', each with a corresponding bar chart. A 'DONATE' button and a 'Favorite' option are also visible.

charitynavigator.org/ein/363245072

Sign in Nonprofit Resources Support Charity Navigator

Charity Navigator Search by Charity or Cause Discover Charities Donor Basics About Us

The Rotary Foundation of Rotary International

<https://www.rotary.org/myrotary/en/rotary-foundation>
14280 Collections Center Drive
1560 Sherman Avenue
Chicago IL 60693
847-866-3000

Chicago IL | IRS ruling year: 1983 | EIN: 36-3245072

Organization Mission
The Rotary Foundation's mission is to advance world understanding, goodwill, and peace. Rotary Foundation grants promote peace, fight disease, provide clean water an ... [\(More\)](#)

Rating Information

Great

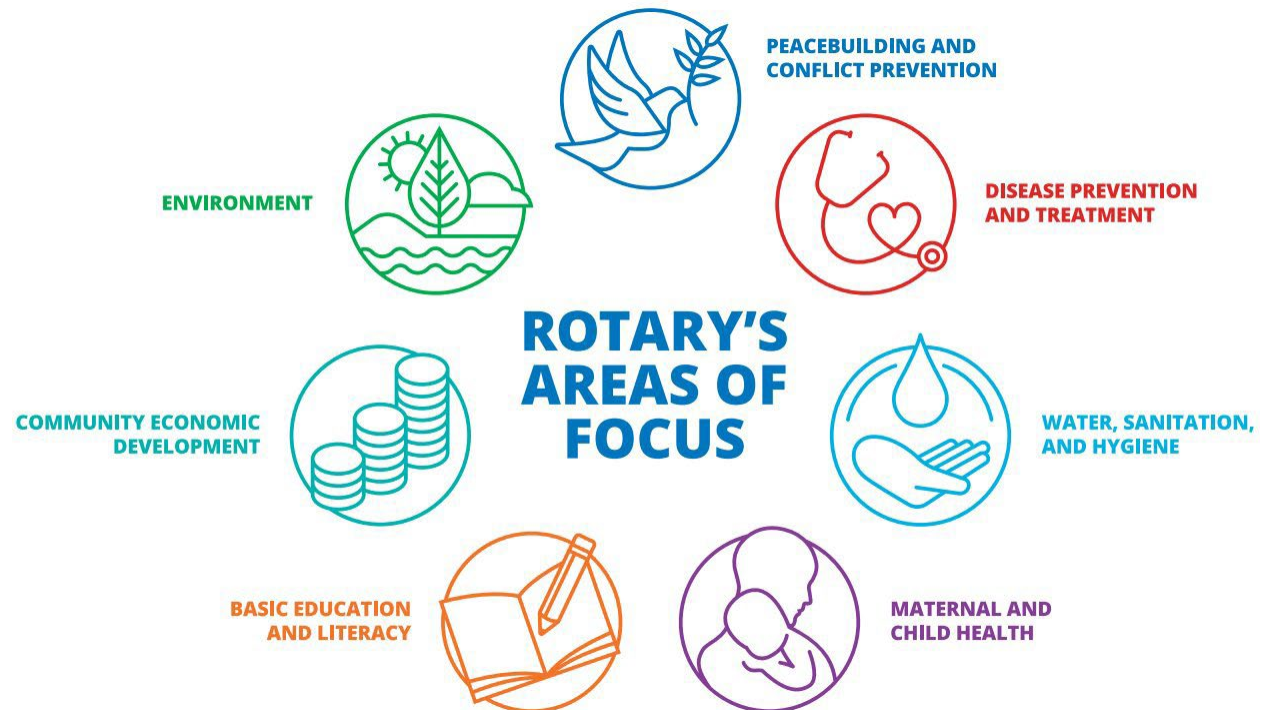
This charity's score is 100%, earning it a Four-Star rating. If this organization aligns with your passions and values, you can give with confidence.

100%
Four-Star Charity

Impact & Results
Accountability & Finance
Culture & Community
Leadership & Adaptability

DONATE
Favorite

Rotary's Seven Areas of Focus



The Motto of The Rotary Foundation

DOING GOOD IN THE
WORLD

The Mission of The Rotary Foundation

THE ROTARY FOUNDATION HELPS ROTARY MEMBERS TO ADVANCE WORLD UNDERSTANDING, GOODWILL, AND PEACE BY IMPROVING HEALTH, PROVIDING QUALITY EDUCATION, IMPROVING THE ENVIRONMENT, AND ALLEVIATING POVERTY.

2024 - 25 ANNUAL JOINT GOALS

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

GOALS FOR PRIORITY 1 - INCREASE OUR IMPACT

1. Eradicate polio, highlight Rotary's role, and plan for a polio-free world.
2. Increase the overall giving to The Rotary Foundation and build the Endowment Fund to \$2.025 billion by 2025.
3. Encourage community assessments and measurement of projects and programs at the club, district, and international level.

GOALS FOR PRIORITY 2 - EXPAND OUR REACH

4. Advance actions to cultivate diversity, equity, and inclusion in our clubs and the family of Rotary.
5. Strengthen existing relationships and develop new partnerships that align with our Action Plan.
6. Establish and nurture innovative clubs and new participant engagement channels.
7. Increase awareness and understanding of Rotary and our members' impact in communities locally and globally.

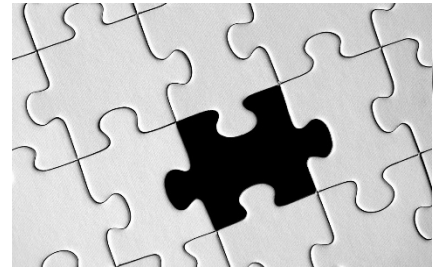
GOALS FOR PRIORITY 3 - ENHANCE PARTICIPANT ENGAGEMENT

8. Enhance member engagement tools that support clubs in meeting their members' needs and increasing member retention.
9. Increase collaboration and connection among participants, particularly Rotary and Rotaract clubs.
10. Highlight opportunities offered through Rotary to foster professional connections and build leadership skills.

GOALS FOR PRIORITY 4 - INCREASE OUR ABILITY TO ADAPT

11. Support regional adaptability by testing innovative approaches to foster greater collaboration and operating efficiencies.
12. Support diversity, equity, and inclusion in our leadership and governance.

Engaging Members



I make my club and Rotary stronger by my active participation.

Session Goals:

- Review why people are attracted to and join Rotary
- Learn the factors that retain members in Rotary
- Discuss the importance of participation

Resources

- Sample Membership Satisfaction Survey PDF
- Rotary Club Models <https://my-cms.rotary.org/en/document/club-types>
- Expanded Membership Satisfaction Survey: <http://my.rotary.org/en/document/enhancing-club-experience-member-satisfaction-survey>
- Engagement Ideas: Delivering Value - Keeping Rotarians PDF
- 12 Point Plan for Membership Engagement PDF
- Creating Your Membership Development Plan <https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>
- Club Assessment Tools <https://my.rotary.org/en/document/membership-assessment-tools>
- No Success Without Succession, Michael McQueen 2010 PDF
- Membership Page at www.rotary.org
- www.rotary.org/myrotary/en/learning-reference/learn-topic/membership
- Rotary Fellowships <https://www.rotary.org/en/our-programs/more-fellowships>

Session Activities

1. What is member engagement?
2. Why do people stay in Rotary?
3. Could club meeting times or club structure have an impact? How?
4. What role could technology play in engaging members?
5. How does your club encourage inclusion?
6. Where can you find help?

Summary:

- The more your members know and get involved, the stronger your club will be.

siegel + gale – Why Join Rotary?



siegel + gale – Why Stay in Rotary?



ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY



The experience your club offers people affects how they feel about the club. By asking members for feedback regularly and then responding to it, you're showing your openness to change and empowering them to help create their ideal club experience. The Member Satisfaction Survey can help you gather feedback so you can use it to ensure that members are enjoying their experience.

WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Identify what your members like and dislike about their club experience
- Develop an action plan that builds on what people enjoy and that ends or changes what they don't

GETTING ORGANIZED

You'll need a dedicated group of people to conduct the Member Satisfaction Survey. It can be your club's membership committee or a few interested volunteers. You can devote time during a club meeting to discuss how satisfied people are and have them take the survey. You could also hand out the survey or email it to members so they can have more time to complete it. Or you could hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



Emphasize to those administering the survey the importance of keeping the responses confidential when they discuss and analyze them. Be sure to tell members this will happen.



Consider using an online survey platform. They're convenient, often free or inexpensive, and helpful in managing the response data.



Be sure to allow enough time when you're planning the schedule. Each step can take a week or longer.

GETTING STARTED

Step 1: Customize the survey.

Use the sample questions below to develop your club's Member Satisfaction Survey.

Step 2: Distribute the survey.

Distribute the survey to people or use an online survey platform. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

Step 3: Analyze the data.

Have the group you organized to administer the survey review the results. Remind people about the importance of confidentiality and respecting all viewpoints.

Step 4: Share the results and make an action plan.

Present the survey results to the club and discuss them. Allow time for members to ask questions and offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for making changes.

Step 5: Take action.

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they're invested in making the club experience better for everyone.

Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Exit survey](#)

Use the Club Action Plan in appendix 1 to track your membership efforts.

MEMBER SATISFACTION SURVEY

SAMPLE QUESTIONS

This survey focuses on your typical experiences in our club. Your input is valuable and will be used to make the club even better for everyone. There are no right or wrong answers, so simply offer your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with being a member of our club?

- Satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Dissatisfied

2. Thinking about our club’s **culture, members, and meetings**, indicate how much you agree with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I enjoy our club meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job involving new members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Members of my club care about each other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club is as diverse as our community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Members are involved in ways that match their interests and skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The number of fundraising activities is appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our club has a welcoming environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can freely express myself among our club members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud to belong to this club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

3. How do you rate the following aspects of club meetings?

	Excellent	Good	Fair	Poor	Very poor	Not applicable
Rotary International updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format (online, in person, or hybrid)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for socializing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional connections and networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content variety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting time and day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals or other food options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities to offer input and have discussions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

4. What do you think about these aspects of our club's **service projects**?

	Just right	Too many	Too few
Total number of projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of local projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of international projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Disagree	No opinion
Our projects are well-organized.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our projects make a difference in the community or the world.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our projects are meaningful to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

5. Thinking about **communication** and **responsiveness** in our club, indicate how much you agree with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club is good at communicating with members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club is good at listening to members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club seeks input and ideas from members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club regularly acts on input and ideas from members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club updates our processes and rules to meet the needs of our members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm comfortable with the pace of change in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

6. Indicate how much you agree with the following statements about being a member.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I am welcome in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can be myself around members of my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club members know me and value me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I make valuable connections through my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club provides opportunities to use my talents and skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have access to leadership opportunities in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My Rotary experience is worth the cost.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the time I commit to Rotary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My family understands the value I place on my Rotary membership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends understand the value I place on my Rotary membership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in my community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in the world.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

7. Indicate how much you agree with the following statements about club engagement.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I invite my friends, family, and colleagues to club events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I invite prospective members to join my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I frequently participate in my club's activities, projects, and programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud of my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

8. Think about the costs associated with being a club member and rate these factors.

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for donations for service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

9. What didn't we ask about that you'd like to start, stop, or continue in your club?

Engagement Ideas: Delivering Value – Keeping Rotarians

The Issue: Of all the members who leave Rotary, only about 7% leave for involuntary reasons (death, relocation, etc.) Most of the folks who leave have been members for less than 3 years.

The Fix: Find ideas to engage, especially your newer members, who likely joined to serve their community, network, and make new friends.

Our Ideas:

Buddy System	Partner newer members with more experienced members to act as mentors and help them adapt to your club atmosphere and “learn the ropes”.
RLI Posse	Consider having your club cover the cost of sending new members to RLI.
Fun Committee	Put new members on a committee devoted to holding fun activities for everyone! Maybe a group visit to a local attraction, concert, or play. Maybe it is a new fun event during the meetings.
Adopt A Class	Partner members with local elementary schools to conduct reading, mentoring, or other activities.
Rotary Minute	Have every member share a 1-minute talk about themselves. It could be their “Rotary Aha” moment or a “get to know you” moment.
Interact	Start an Interact group or get involved with your existing club!
Party Planning	Put together a committee to arrange social events outside of the regular club meetings.
Vocational Minute	Have every member give a short presentation on their vocation or information about their vocational field.

Your Ideas:

Twelve Point Plan for Member Engagement

- 1) Set up a Member Services Committee
- 2) Measure & Examine Club's History of Engagement and Member Retention Rate
- 3) Provide Pre-Induction Orientation Program
- 4) Greet – Assign a Job – Introduce –
- 5) Develop a Mentor & Education Program
- 6) Conduct a Reception for New Members
- 7) Log New Member Activities the first year
- 8) After Year One- Recognize & Interview
- 9) Advocate New Member Opportunities
- 10) Provide Networking & Professional Development Opportunities
- 11) Spot Danger Signs and Remedy Engagement Problems
- 12) Be Innovative – Highlight the Reasons We Stay in Rotary

Thinking Outside the Box—Perk Up Club Meetings!

1. Have Rotarian's connections run a meeting—spouses, partners, or children.
2. Switch club president with a nearby club and have that president conduct your meeting.
3. Change the room layout—completely.
4. Reverse the order of the regular agenda.
5. Invite a new member to organize a meeting.
6. Bring in a professional coach to run a meeting.
7. Invite past presidents who have left the club to come back and reflect on the changes in Rotary over the years.
8. Cancel your regular meeting and ask members to attend another club in the area to see how that club operates and bring back ideas.
9. Use a Rotary Learning Center video for your meeting.
10. Change the meeting time.
11. Focus on vocational development with members relating how their businesses started and the challenges they faced.
12. Create a promotional document to give to speakers before they arrive so they know what to expect at your club meeting (and for marketing).
13. Visit local businesses instead of a formal meeting.
14. Have a “pocket presentation” ready in case the scheduled presenter doesn't show up. It could be a video, a club member who is ready, or a quick project.
15. Develop a “speed-networking” event for members and invite your community.
16. Celebrate something in your community—arts event, team championship, or local school successes.
17. Have a social instead of a regular meeting.
18. Attend a community event as a group – sporting, museum, art gallery, or play.
19. Have a trivia contest.
20. Discuss the Rotary monthly theme.

CLUB EXPERIENCE MATTERS THE MOST

Recent Rotary research confirms that the single most important factor in member satisfaction is the club experience.



Using our Membership- Assessment Tools guide, which includes the Member Satisfaction SurveyJ can help you craft an experience that reflects your members' interests and needs



Creating Service Projects



I am a vital part of a worldwide service organization meeting needs in communities.

Session Goals:

- Identify the qualities of a good service project
- Relate the culture of your club to meeting the needs of your community
- Explore effective strategies and best practices for creating and leading successful service projects in your club.

Resources

- Community Assessment Tools
<https://my-cms.rotary.org/en/document/community-assessment-tools>
- The Rotary Foundation's 7 Areas of Focus
<https://www.rotary.org/en/our-causes>
- Tips to a Successful Project
<https://www.rotary.org/en/tips-successful-rotary-project>
- Lead Your Club Service Projects Committee
<https://my-cms.rotary.org/en/document/lead-your-club-service-projects-committee>
- Rotary Community Corps
<https://www.rotary.org/en/our-programs/rotary-community-corps>
- Toxic Charity
<https://www.luptoncenter.org/toxic-charity-holistic-overview/>
- John Kotter's 8 steps to leading change
<https://www.kotterinc.com/methodology/8-steps/>

- 1) What is a service project?
- 2) What is the best way to find a project?

- 3) How do you present the project to your club? What steps could you use?

- 4) How will you evaluate the success or lack of success of your project? What are your benchmarks?

- 5) What new ideas did you try to include? How could you make it “bigger, better, bolder?”

6) What options do we have for fundraising?

SUMMARY

Good Rotary Service projects require:

- Meeting a community identified need today
- Creativity
- Sustainability
- Risk taking
- New ideas
- Keeping prior projects only if they are still needed

Service Project A

Rotarians and community leaders have been concerned that there are not enough recreational facilities and activities for teenagers in the community. With little to do and no place to “hang out,” teenagers have been gathering at the shopping mall or the town square, sometimes getting into trouble and harassing older people and other teens.

A team of Rotarians visited the Mayor, who agreed that more recreational facilities and activities are needed for teenagers, but the town budget cannot pay for a youth center, etc. The Mayor did say that the town has a vacant lot that could be donated or used for some purpose. It also has a vacant two-room school building that could possibly be repaired and used for teen activities; however, it has not been used for several years and is not in very good condition.

Service Project B

Members of your club have talked to the head of the local welfare department about possible projects, and she told them of an elderly couple who were largely confined to their home because they couldn’t navigate the 6 steps to the front of their home. They also had trouble climbing the steps to their bedroom and often ended up sleeping on a couch or even on the floor. The head of the welfare department asked if Rotary could help the couple.

Service Project C

Members of your club have talked with the principal and some teachers and guidance counselors at an elementary school in town to learn the major issues for the students. Unfortunately, there are a lot of problems, but the educators believe that the most significant issue is that some third graders are far behind in reading skills, and some can’t read at all. What can your Rotary club do to help third graders become better readers?

Service Project D

Members of your club are concerned about the impact of mowing roadside hedgerows on the environment and local wildlife. There is also great concern about the water quality of the local stream. After talking with local politicians, you have found they are supportive, but have no specific plans. What can your Rotary club do to address these problems?

Service Project E

You have become aware that many elderly people in your local community live in loneliness either by living alone in their homes or by living in a nursing home. Many of the older people want to be participants in society but have no arenas to participate on.

At the same time, there are several young people in your local community who have little to do and are walking rootless around in the local community. How can you as a Rotary club contribute to young and old people finding common meeting arenas where the old ones can participate, and the young ones can find meaningful activities?

Service Project F

In recent years, many young people have gathered in the city on public holidays and have been obviously influenced by alcohol and other drugs. Several are 16 years of age or younger and are not allowed to drink or buy alcohol.

On the last public holiday, many young people gathered in the city center and the police warned against a negative youth culture and called for more sober adult role models in the city center on these days.

How can you, as a Rotary, take part in preventing a negative development in the city center and how can you get more elderly people on board?

Service Project G

Many youngsters do not know what they are going to study when they have finish secondary school and are unsure of what courses they should choose on high school.

Many Rotarians have long professional experience from many different professions and can tell young people about their experiences from professional life.

A secondary school has contacted your local Rotary Club to organize a career day where young people can get advice on which education they can choose to achieve their goals.

Decide how your Rotary club can organize a career day in collaboration with the secondary school.

Service Project Questions

1. Can a Rotary club do anything to help?
2. If so, what can Rotarians do “hands on” to help?
3. How much funding is required? Fundraising?
4. How can the project be designed? What is needed?
5. Will the project generate good publicity for the club?
6. Can the members be “sold” on the project?
7. Is this a one-year project or a continuing project?
8. What other community resources are available or what other organizations should be involved?
9. What are the steps necessary to move forward?

*"The time we take
to serve those who
need us can be the
turning point, not
only in their lives but
also in our own."*

1980-81 RI Pres. Rolf Klarich

— Take Time to Serve

THE ROTARIAN, July 1980

John Kotter's Eight Steps to Leading Change

<https://www.kotterinc.com/methodology/8-steps/>

1. Create a sense of urgency

Inspire people to act – with passion and purpose – to achieve a bold, aspirational opportunity. Build momentum that excites people to pursue a compelling (and clear) vision of the future... together.

2. Build a Guiding Coalition

A volunteer network needs a coalition of committed people – born of its own ranks – to guide it, coordinate it, and communicate its activities.

3. Form a Strategic Vision

Clarify how the future will be different from the past and get buy-in for how you can make that future a reality through initiatives linked directly to the vision.

4. Enlist a Volunteer "Army"

Large-scale change can only occur when massive numbers of people rally around a common opportunity. At an individual level, they must *want to* actively contribute. Collectively, they must be unified in the pursuit of achieving the goal together.

5. Enable Action by Removing Barriers

Remove the obstacles that slow things down or create roadblocks to progress. Clear the way for people to innovate, work more nimbly across silos, and generate impact quickly.

6. Generate Short-Term Wins

Wins are the molecules of results. They must be recognized, collected, and communicated – early and often – to track progress and energize volunteers to persist.

7. Sustain Acceleration

"The way that you can guarantee success in a difficult change... is to not skip any of the steps or the learnings."

8. Institute Change

Articulate the connections between new behaviors and organizational success, making sure they continue until they become strong enough to replace old habits. Evaluate systems and processes to ensure management practices reinforce the new behaviors, mindsets, and ways of working you invested in.

Toxic Charity by Robert Lupton A Synopsis

Toxic Charity the Book

Toxic Charity was a book that Bob Lupton published in 2011. At the time of its publication, Bob Lupton and his wife Peggy had lived and worked in Atlanta for nearly 40 years. The organization Bob founded, which was initially called Family Consultation Services, was working to revitalize neighborhoods in Atlanta that had been deeply affected by systemic injustice.

Living alongside neighbors in Atlanta, Bob started to notice the ways many charity programs were unhelpful at best and at worst downright degrading. At the same time, he knew that everyone coming to his neighborhood to do charity had their hearts in the right place. Many of them truly wanted to help. They simply had no idea what they were doing was harmful. Bob wrote Toxic Charity to illustrate the reality of what was going on for his mostly white, mostly middle and upper class, mostly educated, and overwhelmingly Christian peers. He wanted them to see the true effects of their charity and offer them a new model.

What *is* Toxic Charity

At its core, Toxic Charity is trying to address chronic ongoing poverty through one-way crisis relief. Common charity models like toy giveaways, school supply handouts, food pantries, and the like are examples of short-term fixes focused on transferring resources. The issues they address tend to be much broader, larger, and more systemic. As a result, one-way charity rarely solves the underlying issue, but results in a cycle of continual one-way giving and receiving.

Unfortunately, Toxic charity can end up reinforcing assumptions about givers and receivers, namely the idea that receivers core issue is that they “lack” items or resources and “need” someone to provide them. This paradigm can bolster deeper biases, like the idea that low-income people don’t know how to manage money or don’t work hard enough.

Toxic Charity can get even more dangerous when a “giver” or program has little geographic or relational tie to the people they’re giving to. Commuting into a neighborhood to give hand-outs can make it more difficult to form relationships based on dignity and trust.

Common Toxic Charity Mistakes

We talk to Change-Makers who really want to make a difference every day. Here are a few common Toxic Charity mistakes:

Only Focusing on Resource Transfer

Sometimes it can be tempting to try to transfer resources, only in a slightly more dignifying way. For example, we’ve encountered Change-Makers who realized that handing out Christmas presents to children can be really embarrassing for parents — it’s toxic charity. The next step they take is hosting a Christmas store where parents can come and select toys for their kids, wrap them, and give them to their children. This is an absolutely improved model, and it’s one

we use ourselves every year for Pride for Parents! What's key is that we know the toy store won't solve material needs. Resource transfer can be a healthy ecosystem and a way for organizations to engage, but it is not in itself the solution we are pursuing. This toy store isn't the only way we come alongside a neighborhood here in Historic South Atlanta.

Shifting to Development without Relationships

Proximity, or being emotionally, physically, and geographically integrated with the neighborhood where you want to work is absolutely essential. Change moves at the speed of trust. Trust is impossible without building neighborhood relationships. Relationships are shallow without time spent listening, learning, and seeking to understand. Yes, it can feel slow, and we know it can be tempting at times to change the systemic realities of a place without investing in relationships. Unfortunately, working on a systemic level without collaborating with neighbors can look like doing development *to* people without their consent. Building new roads or businesses can be great, but if they're completed without community buy-in, they will rarely make a difference and can even cause harm.

Locating Toxicity in Neighbors

We all have biases. Interrogating them is critical to being a trustworthy partner. One common error we've seen is change-makers trying to change their models without changing their own hearts. We have seen some people try to make change while still viewing their neighbors or neighborhoods as deficient. We've had tough conversations with some people who come to the conclusion that Toxic Charity is toxic because recipients are greedy or lazy. These biases will get in the way of trust and true partnership. Beliefs like these also tend to ignore local history and the realities of systemic injustice. We encourage everyone to examine their internal biases and to examine the histories of systemic injustice. We're all part of systems that oppress some and give others an advantage. We're all also un-learning prejudices and assumptions we have. It's a journey!